

ABSTRACT

Title of Document: TEACHING HISTORICAL THINKING: THE
 CHALLENGE OF IMPLEMENTING REFORM-
 MINDED PRACTICES FOR THREE FIRST YEAR
 TEACHERS

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Researchers in history education have argued the importance of closing the gap between how history is practiced in the discipline and how history is taught in schools. This study explores how three teachers who had learned to teach historical thinking in their teacher education program then implemented these practices in their first year of teaching. Data collected over a two-year period included observations of teachers in their methods courses and field placements; a pre-test and post-test administered before and after the completion of the teacher education program; observations of two units of instruction per teacher during their first year teaching; interviews with teachers during their teacher education program and first year of teaching; and analysis of documents collected over the two year period. Case studies revealed that one of the three teachers routinely taught historical thinking while the other two teachers implemented discipline-based practices less frequently. Cross-case analysis showed that each teacher's development and enactment of research-based practices varied. While the teachers' learning and working contexts, including teacher education and the school and district contexts, influenced if and how teachers taught historical thinking, a number of other

factors contributed to teachers' decision making. These included teachers' understandings of the discipline, knowledge of how to make these thinking strategies accessible to students, vision and beliefs about teaching history, available tools and resources, and individual dispositions. This study highlights the intricate nature of how teachers learn and develop and offers insight into how researchers and practitioners can support new teacher learning. This includes continuing to improve teacher education to enhance life-long learning; better aligning the goals of local schools and districts with those of research-based teacher education programs; and providing ongoing supports, such as induction programs sponsored by the University, once teacher candidates graduate. This study also suggests the need for communities of practitioners who share reform-minded goals and collaborate regularly to inquire about and improve practice.

TEACHING HISTORICAL THINKING: THE CHALLENGE OF IMPLEMENTING
REFORM-MINDED PRACTICES FOR THREE FIRST YEAR TEACHERS

by

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Table of Contents

Acknowledgements.....	ii
Table of Contents.....	v
List of Tables.....	viii
List of Figures.....	ix
Chapter 1: Introduction.....	1
Chapter 2: Teaching Historical Thinking: A Framework for Examining Teachers’ Developing Practices.....	6
School History: An Emphasis on Heritage.....	7
Disciplinary History and Historical Thinking: The Art of Historical Interpretation.....	10
Procedural Knowledge and Historical Thinking.....	10
Disciplinary Concepts and Historical Thinking.....	12
Student Learning and Historical Thinking.....	14
Building on Students’ Prior Knowledge: The Role of Schema in Knowledge Acquisition.....	15
Supporting Students’ Historical Thinking.....	17
A Framework for Examining Beginning Teachers’ Practices.....	18
Factors that Influence How Beginning Teachers Teach History.....	21
The Role of Context in the Development of New History Teachers.....	28
Teaching Historical Thinking: Implications for Future Research.....	36
Chapter 3: Methodology.....	39
Design.....	39
Context of Teachers’ Learning.....	40
Program Summary.....	40
Transforming Teacher Candidates’ Ideas about History.....	41
Attention to Student Thinking.....	45
Participants.....	46
Steve.....	46
Bryan.....	48
Maya.....	49
Data Collection.....	51
Observations.....	53
Interviews.....	56
Documents and Classroom Artifacts.....	56
Pre-test/Post-test.....	57
Ranking Task.....	57
Limitations.....	57
Data Analysis.....	58

Chapter 4: Teaching History as an Interpretive Discipline—Steve’s Emphasis on Historical Thinking.....	61
Overview of Instructional Units.....	62
Steve’s Primary Goal: Teaching Students the Art of Historical Interpretation.....	63
Teaching Students How to Read Historical Texts.....	67
An Introduction to Sourcing: Is this Art?.....	68
Teaching Students to Evaluate the Reliability of Historical Accounts.....	70
Teaching Evidence-based Thinking.....	75
Teaching Historical Thinking: Areas for Future Development.....	79
Working within Constraints: Steve’s Efforts to Balance Historical Thinking and Content Coverage.....	80
Developing Strategies to Scaffold Students’ Historical Thinking.....	84
Teaching Historical Thinking: A Summary of Steve’s Practices.....	88
Chapter 5: “A Tale of Two Units”—Bryan’s Dual Focus on Historical Thinking and Comprehension of Fixed Historical Content.....	90
Overview of Instructional Units	91
Teaching Students to Read and Analyze Evidence: A Spanish American War Inquiry.....	94
Using Historical Documents to Understand Historical Issues: A Focus on Close Reading and Comprehension.....	101
Teaching Students How to Read Historical Texts: Sourcing and Contextualization.....	107
Historical Thinking and Content Coverage: Complimentary or Competing Demands?.....	113
Using Historical Texts to Convey a Story.....	114
Content Coverage: Meeting County and Department Demands.....	116
“A Tale of Two Units”: A Summary of Bryan’s Practices.....	119
Chapter 6: Providing Limited Opportunities to Teach Historical Thinking—A Glimpse into Maya’s More Traditional Instructional Practices	121
An Overview of Maya’s Instructional Units.....	121
Teaching History as Fixed Knowledge.....	124
Teaching <i>the</i> Causes of Imperialism.....	124
The “Who” and “What” of World War II: Focusing on Important Individuals and Events.....	128
Developing Teaching for Historical Thinking	135
Using Primary Sources in the Classroom: Focusing on Reading Comprehension with Beginning-Level Historical Thinking.....	136
The Beginning Steps of Historical Inquiry.....	141
Teaching Historical Writing.....	145
Teaching Historical Thinking: A Summary.....	147
Chapter 7: Developing Instructional Practices in Different Teaching Contexts.....	149
Teaching Historical Thinking: A Comparison of Teachers’ Practices.....	149
Teaching Students to Read and Analyze Evidence.....	150

Instructional Strategies that Facilitated Historical Thinking.....	151
Content Coverage versus Historical Thinking.....	153
The Role of Context in Developing Practice.....	154
Teacher Education and its Influence on Teachers' Practices.....	155
Finding the Right Level of Support: Examining the Role of the School and District in Supporting Practices that Promote Historical Thinking.....	162
Mediating Contextual Influences: The Role of Teachers' Understandings, Visions and Dispositions in Teaching Historical Thinking	175
Teachers' Disciplinary Understandings and the Development of a Vision of Practice.....	175
The Role of Teachers' Dispositions in the Development of Practice.....	180
Conclusion.....	185
Chapter 8: Conclusions and Implications for Teacher Education, Practitioners and Future Research	188
The Tension between Teacher Education and Local School and District Contexts.....	188
Managing the Tension between Teacher Education and Schools and Districts: Understanding Differences in Local Contexts.....	190
The Role of Teachers' Disciplinary Understanding in Managing the Tension between Historical Thinking and Content Coverage.....	191
The Emergence of a New Conceptual Framework.....	193
Implications for Teacher Education.....	194
Supporting Historical Thinking through Induction Programs and Ongoing Professional Development.....	197
Implications for Future Research.....	199
Appendices.....	203
References.....	306

List of Tables

Table 1. <i>Teacher Data Collection</i>	52
Table 2. <i>Data Collection: Observations and Interviews</i>	55
Table 3. <i>War with Mexico Inquiry Activity</i>	79
Table 4. <i>Example Team Exam Questions and Test Questions Added by Steve</i>	83
Table 5. <i>Example of Team Chart for Document I</i>	98
Table 6. <i>Spanish American War Inquiry- Document-based Questions</i>	142
Table 7. <i>Defining History</i>	177

List of Figures

<i>Figure 1.</i> Conceptual framework: Teaching historical thinking in multiple contexts.....	20
<i>Figure 2.</i> Teaching historical thinking within competing contexts.....	194

Chapter 1: Introduction

This idea of historical inquiry as a way of “doing history” was an idea that was new to both myself as well as the other graduate students... It has been very difficult as a new teacher to attempt to break from the mold of traditional teaching techniques such as memorizing names, dates, big battles/wars, etc... I would say my practices are similar to other teachers in my department only because I have not amassed enough lessons to completely break free of the rote memorization world. My thinking or stance, on the other hand, on how social studies “should” be taught is quite different... After looking again at my discipline and the desire our instructors have to get us to teach social studies in a certain way [teaching historical thinking], I’m concerned to say the least. It seems as if there’s an overwhelming culture that is stuck teaching social studies “the old way.” How then can a new teacher break from that mold if there are no other teachers to collaborate with, etc? (Social studies teacher candidate, course assignment, 11/14/07)

The concerns of this beginning history teacher reflect the thoughts of many novices who learn to teach historical thinking¹ in teacher education and then enter school cultures where notions of history remain fixed and center on content coverage. Currently, a gap exists between disciplinary history (i.e. how historians approach historical study) and school history (i.e. how history instruction is approached in classrooms). Whereas historians use modes of inquiry to construct complex and competing narratives based on

¹ Historical thinking refers to the process of using modes of inquiry to analyze evidence and construct interpretations about the past (cf. Holt, 1990). Historical thinking strategies include discipline-specific concepts (e.g., significance, empathy, cause) and discipline-specific processes (e.g., sourcing, contextualization, corroboration), which are used as a basis for generating historical arguments. These ideas are discussed in further detail in the next chapter.

evidence, schools often view history as a single accurate story of the past, in which events, dates, and people are highlighted in a narrative of progress (Sandwell, 2005; VanSledright, 2008). This dichotomy creates a tension for novice teachers when they are prepared to teach history as an interpretive discipline and then enter school contexts that view history quite differently.

Reform efforts in history education have sought to minimize the gap between disciplinary and school history, but we have yet to see significant changes implemented at the classroom level. Teaching methods continue to emphasize factual knowledge and recall in schools (cf. Cuban, 1984; Goodlad, 1984).² Why is this important? Why should history teaching methods be grounded in disciplinary modes of inquiry? Two primary purposes for teaching students how to think historically are to improve their understanding of history as a field of disciplinary inquiry and to enhance their development as informed citizens who can participate constructively in a pluralist democracy (Barton & Levstik, 2004). When students analyze conflicting primary and secondary accounts, they learn that history is contested and that different interpretations exist. By analyzing multiple perspectives and corroborating across accounts, students learn to identify connections among sources of evidence and to then use that evidence to construct their interpretation of the past in the form of a historical argument (Barton & Levstik, 2004). These historical thinking strategies in turn foster important life skills, such as critical and evidence-based thinking, that apply to fields well beyond history. Being an informed and knowledgeable citizen requires acknowledging and valuing

² Dating as far back as 1892, reform efforts, such as the Committee of Ten, have sought to bring habits of thinking in the discipline to the classroom. The New Social Studies movement of the 1960s and 1970s (c.f. Fenton, 1966) stressed the importance of teaching history as a mode of inquiry. More recent policy documents (e.g., National Center for History in the Schools, 1996) have also emphasized the importance of historical thinking.

multiple perspectives, evaluating and assessing information, and making decisions based on reason and evidence.

Teachers are key players in any effort to change the way history is practiced in schools. To help students learn how to think historically, teachers must have knowledge of the discipline's structure and know how to translate disciplinary understandings into instructional practices. In the face of accountability pressures and standardized curriculum that do not necessarily promote reform-minded practices, teachers need to be agents of change in promoting modes of inquiry and the process of *doing* history. This has significant implications for the role of teacher education in preparing new teachers.

Research on teaching and learning in history education has expanded significantly in the past twenty years, but it lacks breadth and depth in research on new teacher learning and decision making. How are new social studies teachers prepared to teach historical thinking? What happens when teachers who develop a vision for teaching historical thinking enter organizational structures (e.g., local school contexts) that do not emphasize these same modes of knowing and learning in the discipline? Research on methods courses and field experiences in social studies teacher education is relatively thin (Clift & Brady, 2005). Studies have centered primarily on broad interests or change efforts in social studies (e.g., the purpose of teaching social studies, citizenship education, and social justice) rather than discipline-specific approaches (e.g., teaching historical thinking) (Adler, 1991; Clift & Brady, 2005). Limited studies have investigated the influence of methods courses that aim to teach historical thinking specifically.

Fehn and Koeppen (1998) and Wilson and Yeager (1997) studied the influence of history-intensive methods courses on student teachers' enactment of historical thinking.

Even though preservice teachers learned discipline-specific pedagogies in teacher education, their ability to implement these ideas varied because of their perceived efficiency, concerns over classroom management, and socializing forces in the field, such as pressures to yield to mentor teachers' traditional instructional practices and content coverage requirements (Fehn & Koeppen, 1998; Wilson & Yeager, 1997). Van Hover and Yeager (2003, 2004) expanded on this research by examining the practices of second year teachers who graduated from a teacher education program that emphasized historical thinking. They too found that these beginning teachers struggled to implement discipline-based practices because of their personal beliefs about teaching history, their perceptions of and expectations for students, and their school and district contexts.

While these studies provide insight into preservice and beginning teachers' instructional methods, they do not fully examine the relationship between teacher education and beginning teachers' practices or provide in-depth descriptions of how the methods course instructors taught historical thinking. The authors describe the pedagogical methods and materials that teachers incorporated into their teaching, but they do not provide detailed examples of historical thinking. When new teachers are able to teach historical thinking, what does it look like in practice? How specifically does teacher education influence new teachers' instructional methods? How do other factors (e.g., school contexts, disciplinary understandings) contribute to teachers' instructional decision making?

The following study builds on existing research by further examining beginning teachers' instructional practices and the factors that influence their decisions. By following teachers through a discipline-based teacher education program that emphasized

historical thinking and into their first year of teaching, this study offers additional insight into how various factors shaped teachers' decision making and their efforts to teach historical thinking. The following two research questions guided this research:

- 1) How do graduates of a discipline-based teacher education program teach history?
- 2) What factors influence if and how new teachers' teach historical thinking? How do various factors influence new teachers' enactment of discipline-based practices?

This dissertation is organized into multiple chapters that address these questions. Chapter 2 examines previous research on teaching historical thinking, specifically within the context of learning these practices in teacher education. Previous findings and areas for further research are identified, providing a baseline for this study. The conceptual framework is outlined and followed by a review of factors that influence teacher learning. Chapter 3 summarizes the study's methods, including participant selection, data collection and analysis. Chapters 4, 5, and 6 provide detailed cases of three first year teachers and their experiences teaching historical thinking. Chapter 7 presents a cross-case analysis of these three teachers' practices and a discussion of various factors that influenced how these teachers taught history. Chapter 8 concludes this study by discussing the implications of this research, particularly for teacher education programs, reform efforts in current school and district contexts, and future research.

Chapter 2: Teaching Historical Thinking: A Framework for Examining Teachers'

Developing Practices

The debate over *what* history we should teach and *how* we should teach it continues despite growing consensus in the education research community. These debates or “culture wars” are more commonly tied to political differences (cf. Gitlin, 1995; Nash, Crabtree & Dunn, 2000) than based on research in how students learn. One perspective argues that students should learn the story of American progress and the democratic ideals presented in the Constitution (cf. Ravitch, 1990; Schlesinger, 1992). It is a story often told through the eyes of those in power, and its supporters would argue that its purpose is to unite Americans through a common history. A second perspective argues U.S. history should be seen through the eyes of multiple cultural groups and that students should learn how all Americans (including immigrants, women and individuals from diverse ethnic backgrounds) have fought to extend democratic ideals and freedoms to those not always granted them. This position asserts that students should learn how democratic processes have grown and changed in the United States, but it also acknowledges that people have had to fight to narrow the gap between our country’s principles and practices (cf. Gitlin, 1995). A third approach to history education emphasizes historical thinking and the processes that historians utilize in the discipline (cf. National Center for History in the Schools, 1994). This perspective argues that students should engage in historical analysis by examining primary and secondary sources and then corroborate across these accounts to form interpretations of the past.

These perspectives regarding what and how history should be taught in schools are linked to how teachers approach instruction. Should students learn a common story

and be able to retell that narrative? Should students learn history from the perspectives of multiple cultural groups? Or should students be taught to question stories of the past using cognitive processes, such as evaluating and corroborating evidence, and learn that history is about interpretation and perspective? Traditionally, teachers have used textbooks to articulate a story of freedom and progress to students, but reform efforts in the discipline have sought to change what and how students learn about the past so that their experiences in the discipline are authentic to the interpretive nature of historical study.

School History: An Emphasis on Heritage

Traditionally, one purpose of history education in the United States is for students to have knowledge of the nation's heritage (VanSledright, 2008). This heritage or collective memory approach to school history highlights themes of freedom and progress and is selective in whom and what are included and/or excluded in the national narrative (Barton & Levstik, 2004). Despite this tendency by schools to equate heritage with history, historians are careful to distinguish these terms. Historian David Lowenthal (1998) contends that whereas history is an account of the past based on investigative processes, heritage is more selective in its story of the past and is used for more celebratory purposes. Similarly, Kammen (1989) argues that "heritage seems to be very nearly a euphemism for selective memory because it means...what history has customarily meant; namely that portion of the past perceived by a segment of society as significant or meaningful" (p.145).

The way historians define and approach historical study compared to how schools traditionally approach the subject has significant implications for student learning. While

students can recount a general narrative of the nation's past, they repeatedly struggle to remember specific details (VanSledright, 2008). Results from the National Assessment of Education Progress (NAEP) U.S. history test continue to report poor student performance (Lee & Weiss, 2007; Ravitch & Finn, 1987), thus suggesting traditional history instruction does not help students retain historical knowledge (Wineburg, 2004). The requirement to study and memorize the heritage story disengages students (Rosenzweig, 2000) and alienates those who have been marginalized in the narrative (Epstein, 2000). Despite reform efforts (e.g., The New Social Studies and the National Center for History in the Schools) that have emphasized historical inquiry and multiple perspectives, state standards documents and schools continue to focus on content knowledge and history as heritage (Kelly, Meuwissen, & VanSledright, 2007).

Contributing to the gap between school and disciplinary history are static teaching practices that have remained largely unaltered in the last century (Cuban, 1984; Downey & Levstik, 1991; Goodlad, 1984). Traditionally, the history teacher's role has been one of knowledge transmitter. Cuban's (1991) review of research in history teaching revealed that the earliest studies of instruction from the early 1900s showed teachers questioning and lecturing students based on the content of the textbook. He found that these patterns of teacher-centered history instruction relied on the textbook and recitation style teaching methods continued throughout the mid to late 20th century. More recent research shows that many history teachers continue to use a traditional approach in which they emphasize information, facts and content coverage in their instruction and assessments (Fickel, 2006; Grant, 2003, 2006; VanSledright, 1996; van Hover, 2006). Factors that contribute to these stagnant practices are state content standards and district curricula and

assessments that prioritize coverage of historical content (e.g., events, people and facts in history) over historical thinking skills (e.g., sourcing and historical interpretation).

In a typical high school U.S. history course, the curriculum covers content that spans from the aftermath of the Civil War to the present. Within this 125 year period, most state standards indicate that students are to learn specific details about a number of historical topics (e.g., Reconstruction, World War I, and the Civil Rights Movement). For example, in a unit on World War II, students might be expected to recall the Cash and Carry policy; the Lend Lease Act; the Atlantic Charter; specific battles, such as the Battle of Midway and the Battle of the Coral Sea; and specific war strategies, such as island hopping, D-Day, and the dropping of the atomic bomb on Hiroshima and Nagasaki. These terms are only a small fraction of the topics that appear on many standards documents and district curriculum guides. As a result of the pressure to cover this factual content, teachers tend to rely on more time efficient modes of instruction; thus, lectures, textbook readings, worksheets, and assessments that emphasize factual recall remain dominant (Downey & Levstik, 1991; Goodlad, 1984; Hicks, Doolittle, & Lee, 2004).

Coverage pressures coupled with an emphasis on collective common knowledge have resulted in patterns of stability rather than substantial change in how teachers approach history instruction, and this has significant implications for how students think about and understand history. However, teachers can break this unremitting cycle by engaging students in historical thinking. For example, by drawing on students' existing knowledge and challenging their preconceptions of what history is, teachers can guide students in a process of inquiring about the past and constructing historical arguments (Bain, 2005; Holt, 1990; VanSledright, 2002b). Research has shown that students as

young as 5th graders are able to engage in these inquiry processes (VanSledright, 2002a).

If teachers learn to teach these ways of knowing in teacher education and continue to refine them throughout their career, then they can engage students in practices that approximate how historians engage in historical thinking and construct historical knowledge.

Disciplinary History and Historical Thinking: The Art of Historical Interpretation

What distinguishes historians from many history educators is that historians know the difference between history (the product of historical inquiry) and the past (evidence such as artifacts or data) (VanSledright, 2004). History is an “act of selecting, analyzing, and writing about the past. It is something that is done, that is constructed, rather than an inert body of data” (Davidson & Lytle, 2004, p. xviii). This disciplinary knowledge is central to historical thinking and the process of reconstructing the past. Historical thinking is a process that involves using procedural knowledge, such as reading and analyzing texts, jointly with discipline-specific concepts (e.g., evidence, empathy, and significance) to construct historical arguments and understandings (VanSledright & Limon, 2006).

Procedural knowledge and historical thinking. Although a number of strategies are important for historical thinking, Wineburg (1991a) identified three particular heuristics—sourcing, contextualization, and corroboration—that historians use when reading and evaluating texts. One of the first strategies used by historians is to look at the attribution or source of the evidence (Wineburg, 1991a). The type of document (e.g., government document, memoir, or letter) and information about the author are important in assessing the importance and reliability of the information and constructing

meaning from the document. Historians use sourcing to recognize the author's point of view and how it influences the author's interpretation (Carr, 1961). This information provides an important framework for understanding and interpreting the evidence. When historians identify the bias or voice of the author, it aids their analysis of the content of the text (Wineburg, 1991a) and their recognition of the subtext of a document (Wineburg, 1991b).

A second important heuristic in reading historical documents is contextualization. Wineburg (2001) argues that one must approach history as strange, see things in context, and "engage in an active process of connecting things in a pattern" (p. 19). The historian must attend to the time period, the setting or location of where the document originated, and the world views at the time. The historian locates an event within a particular historical context through a process of visualization and empathizing with people of the past (Hexter, 1971; Mink, 1987). The context is particularly important when one considers that historians are not able to observe the phenomena that interest them. Rather, they must use evidence that comes from a distant time where meanings of words and the mindset of individuals were different than today. Having such an awareness of this context is necessary to prevent presentism—viewing the past through one's "lens of the present" (Wineburg, 2001, p.19).

A third heuristic used by historians in viewing evidence and forming interpretations is corroborating documents. Using this strategy, historians compare documents to corroborate information and ground claims in evidence so that other historians can crosscheck their findings (Collingwood, 1943). In studying how historians process information when reading historical texts, Wineburg (1991a) found that they used

this strategy of contrasting documents: “They puzzled about discrepancies, they compared the pictures with the written documents, they corroborated and discredited key features, and they tried to represent what could and what could not be known” (p.83). Historians’ interpretation of what happened is influenced by how they gather, compare, and synthesize evidence to make an argument.

Disciplinary concepts and historical thinking. Historical thinking is defined by processes such as sourcing, contextualization, and corroboration, as well as other disciplinary concepts (also known as substantive knowledge, cf. VanSledright & Limon, 2006) when reading and analyzing historical texts. These concepts include (but are not limited to) evidence, empathy, multiple perspectives, significance, and cause (Lee, 2005; Seixas, 1996; VanSledright & Limon, 2006).

One of the most important concepts in historical thinking is evidence: “the concept of evidence is central to history because it is only through the use of evidence that history is possible” (Lee, 2005, p. 54). Historians construct narratives or arguments about the past through critical analysis of multiple sources of evidence. These sources include both relics and records, or unintentional and intentional evidence. Relics, such as coins and tools, are traces of the past, but when they are selected and questioned by historians, they become historical evidence (Levesque, 2008). Records, such as memoirs and novels, are intentionally created for an audience and provide historians with information about events and processes from the time period (Lee, 2005; Levesque, 2008). When forming arguments about the past, historians analyze these different sources of evidence, corroborate key information, and disconfirm contradictory evidence.

A second disciplinary concept important to historical thinking is historical empathy—the ability to consider the perspectives of individuals from the past (Lee, 2005). Historical empathy is related to the process of contextualization because in order to understand an individual's perspective, one must consider the time period and setting. People and societies of the past had a unique and contextualized way of viewing the world; thus, their ways of thinking were quite different than ours today. Although it is impossible for historians to share the same views and feelings as those experienced by people in the past, they aim to consider past perspectives or world views and take them into account when reading historical evidence. In addition to trying to understand individuals' perspectives from the past, it is essential that historians consider multiple perspectives in history. This includes analyzing evidence from diverse groups of people who may have conflicting historical accounts.

Another concept fundamental to historical thinking is historical significance. The identification of an event or phenomenon as significant is determined by the work of a historian, not from the evidence itself. There are no objective measures of historical significance, as it can change with time, perspective, and place. An important aspect of establishing significance depends on the historian's ability to establish relationships among historical phenomena and relate them to the present (Seixas, 1994b).

A final disciplinary concept important to historical thinking is causation in history. It is problematic to construe cause and effect as a linear chain of events. Rather, the historian must look at the relationships among events and identify key elements that help explain movements or events (Lee, 2005). Historians do not identify a single cause for historical actions; rather, they consider multiple and interacting causal factors.

This research study defines historical thinking as an act of historical interpretation that consists of the following procedures and concepts:

- sourcing;
- contextualization (including efforts to empathize with people from the past);
- corroboration;
- evidence-based thinking (e.g., engaging students in the analysis of primary and secondary sources);
- attention to multiple perspectives in history;
- evaluating historical significance; and
- evaluating multiple causes of historical events.

Student Learning and Historical Thinking

While historians have the epistemological framework to enact these ways of thinking and see history as an interpretive discipline, students and teachers do not necessarily have an understanding of these procedures or disciplinary ideas. Bruner (1960) argues that students should be taught processes and topics within the context of the fundamental structure of the discipline. The identification of this structure of historical understanding provides the foundation for discipline-based pedagogy and learning in history classrooms (Seixas, 1996). If school history is to begin to reflect disciplinary ways of knowing, teachers need to learn how to think historically and how to teach students these processes.

Given the complex nature of historical thinking, why should we teach students that history is an inquiry process? History education researchers argue that our brains are not structured to memorize facts upon facts (Wineburg, 2004). Rather, our memory is

most efficient when it is “purposeful and selective” (Wineburg, 2004, p. 1414). By learning history through inquiry, students learn discipline-specific strategies (e.g., sourcing) and concepts (e.g., attention to multiple perspectives) that help them construct evidence-based arguments. When students learn the fundamental principles and practices of a discipline, they are more likely to remember and transfer their knowledge (Bruner, 1960). The goal is for students to learn to think historically so that they can apply these concepts and strategies beyond the classroom. As students encounter information in society, they will be better prepared to consider diverse viewpoints, evaluate source reliability, and corroborate across multiple sources of evidence to articulate well-reasoned arguments.

Teaching students to think historically is not an easy process because students’ prior knowledge filters how they process new concepts and ideas in history. Learning these ways of knowing in history requires students to make an epistemological shift in their thinking, from seeing history as indisputable facts to viewing history as interpreted, constructed and changing. Thus, teachers must confront students’ incoming ideas and scaffold activities designed to develop students’ abilities to reason, read, and write in history (Donovan & Bransford, 2005).

Building on students’ prior knowledge: the role of schema in knowledge acquisition. Students’ prior knowledge plays a significant role in shaping new learning. Their schema represents a mental framework, which is used for comprehension and shapes the way they interpret new events and experiences (Anderson, 1977). Donovan and Bransford (2005) explain, “New understandings are constructed on a foundation of existing understandings and experiences” (p.4). When students initially engage in

historical thinking, their prior knowledge and experiences influence how they read evidence and their ability to construct historical arguments (Afflerbach & VanSledright, 2001; Anderson, 1977; De La Paz, 2005; Epstein, 2000; Monte-Sano, 2008; Mosborg, 2002; Rumelhart, 1980; Stalh, Hynd, Britton, McNish & Bosquet, 1996; Young & Lienhardt, 1998). Students often encounter misconceptions because their previous learning experiences in history did not align with historical interpretation.

Historians and students differ in their conceptions and beliefs about history. Whereas historians have knowledge of the discipline's structure and engage in historical thinking, students view history as factual knowledge to be learned or memorized (Wineburg, 1991a). Traditional history instruction in schools reinforces the idea that history and the past are equivalent (VanSledright, 1995). Students read to find information in textbooks because they perceive it to be a reliable and trustworthy source of knowledge (Rouet, Britt, Mason, & Perfetti, 1996; Wineburg, 1991a). School practices that encourage students to memorize information that has already been interpreted for them do not support historical understanding. When students believe history is comprised of *right* answers, they maintain an epistemology that sees historical knowledge as fixed and objective rather than constructed and contested.

While a student's existing knowledge is an important tool for new learning, it can also lead to serious misconceptions when not addressed directly (Donovan & Bransford, 2005). Teachers face a considerable challenge in helping students make an epistemological shift in how they view history. Students' previous schooling experiences foster an "encyclopedia epistemology" (VanSledright, 2002) of history in which students equate history with a fixed story about the past (Holt, 1990; Limon, 2002; VanSledright,

2002). Students often view the textbook as a reliable and trustworthy source of information (Rouet et al., 1996; Wineburg, 1991a), hold deficit views of the past and construct linear relationships between cause and effect (Barton & Levstik, 1996; Lee, 2005; Lee & Shemilt, 2003; Seixas, 1994a). When students view history as an accumulation of facts, they will struggle when introduced to multiple perspectives, conflicting sources of evidence, and the idea of multiple causation.

Supporting students' historical thinking. An important first step in helping students learn to think historically is to anticipate their conceptions of history and directly challenge their incoming assumptions about history and historical study. By holding student thinking up for critical examination and asking *what* they know and *how* they know, students are more likely to make an epistemological shift in how they view history. To facilitate students' learning and disciplinary thinking, teachers must organize the curriculum around big ideas and translate objectives into historical problems to be investigated (Bain, 2005). Students' understanding is deepened when they have a conceptual framework to organize their new knowledge (Donovan & Bransford, 2005). When students have a framework to organize their thinking and practical tools for analysis, they are better equipped to approach history as an exercise in inquiry.

The degree to which students learn to think historically is dependent on instructional scaffolds. When teachers approach instruction as a facilitator of learning and knowledge acquisition rather than a knowledge transmitter, students develop deeper and more complex understandings (Grant, 2001, 2003). For example, although some students are capable of evaluating multiple perspectives when investigating history, they improve when teachers provide several opportunities to practice and apply disciplinary knowledge

(VanSledright & Kelly, 1998). Although students cannot change their heritage views of history overnight, when provided with sufficient support, they are able to critique each other's use of evidence when constructing historical arguments (VanSledright, 2002b). Similarly, when provided with writing scaffolds (e.g., thesis workshops, outlines, multiple drafts, conferencing, experience with different types of writing), students improve their ability to ground claims in evidence and incorporate historical context in their writing (Monte-Sano, 2008).

Teachers have an important role in providing students with instructional supports that help develop deeper and more complex disciplinary knowledge. With appropriate scaffolds, students can improve their reading and writing and learn to reason in ways aligned with the discipline. If reform efforts are to succeed in closing the gap between traditional school history and discipline-based practices, teachers need adequate disciplinary and pedagogical content knowledge to support students in learning an inquiry-based approach.

A Framework for Examining Beginning Teachers' Practices

If a primary goal of history education is to teach historical thinking, then teachers' learning experiences must align with and support these goals. The process of learning to teach is never-ending; it is a continuum of life-long learning that begins with preservice education (and arguably before then with previous schooling experiences) and extends through induction and professional development (Feiman-Nemser, 2001a). New conceptions of teacher learning, which are grounded in sociocultural learning theory (cf. Vygotsky, 1978), focus on teacher development within the broader context of community, school, and policy (Shulman & Shulman, 2004). Within these contexts,

teachers are members of multiple groups, which influence their beliefs and instructional practices. In examining how new teachers teach historical thinking, this study uses and slightly modifies a broad framework developed by Hammerness, Darling-Hammond and Bransford (2005) that views teachers as continuously learning and developing within multiple contexts (see Figure 1).³

³ Hammerness et al. (2005) developed a conceptual framework, *Learning to Teach in Community*, for studying how teachers learn and develop. This framework highlighted the role of vision, tools, dispositions, practices and understanding within learning communities. While they put vision in the center of the framework, I put teachers' practices (teaching historical thinking) in the center since it is the focus of my research questions. I also changed the word "community" to "context" since this more accurately reflected the data and how participating teachers interacted with other teachers in their schools.

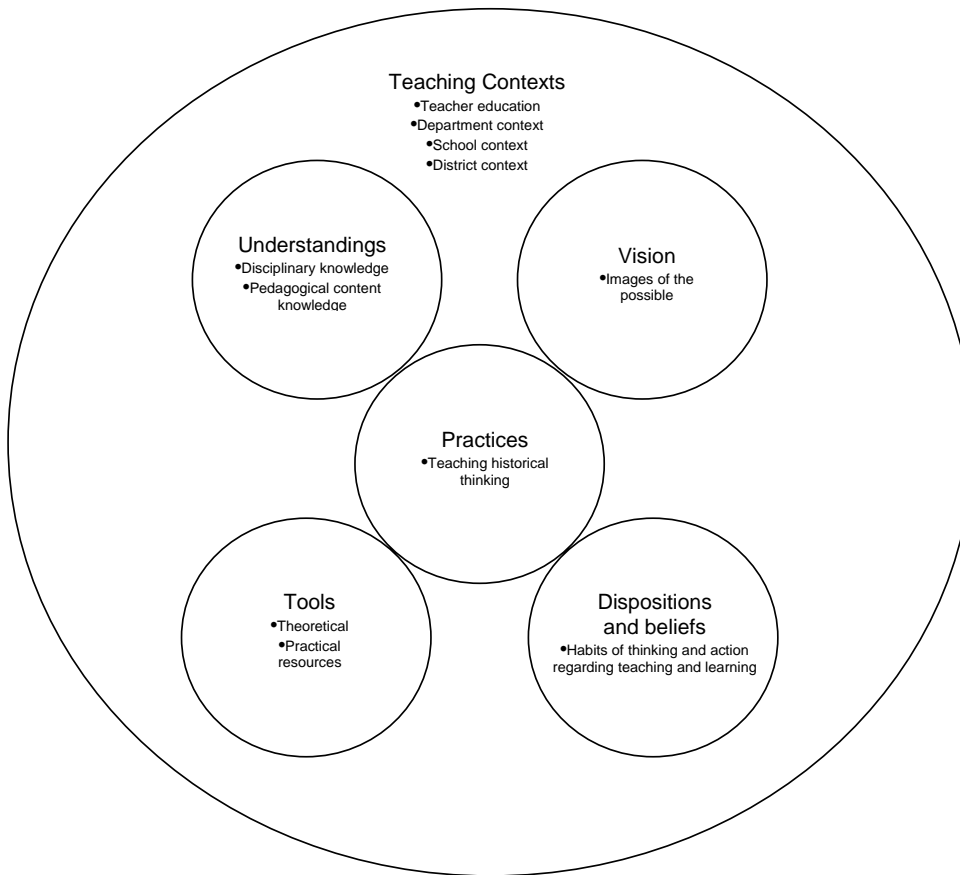


Figure 1. Conceptual framework: Teaching historical thinking in multiple contexts

Factors that influence how beginning teachers teach history. Many factors interact to influence what history teachers learn in university and school contexts and how they then implement instructional practices in their classrooms. These include teachers' personal dispositions and beliefs about teaching, vision for teaching, disciplinary understandings, pedagogical content knowledge (i.e. how to make content accessible to young learners), tools and resources, and the contexts within which they learn to teach.

Teachers' dispositions and beliefs in learning to teach. Existing research in teacher education lacks consensus regarding the influence of dispositions on new teacher learning; however, it is important to acknowledge dispositions as an important factor in learning to teach. Whereas researchers disagree about how dispositions should be defined (Damon, 2007) and how to successfully measure such characteristics (Borko, Liston, & Whitcomb, 2007), the National Council for the Accreditation of Teacher Education (2008) emphasizes professional dispositions in their standards for beginning teachers. One particularly important disposition is having an inquiry stance towards practice, which involves regularly examining and reflecting on teaching and student learning (Cochran-Smith, Barnatt, Friedman & Pine, 2009; Cochran-Smith & Lytle, 1999). Raising questions about teaching practices and student learning and engaging in regular reflection have the potential to improve teachers' understanding and enactment of inquiry-based practices in the classroom as well as their knowledge of student learning (Cochran-Smith et al., 2009; Lotter, Singer and Godley, 2009).

Although research that focuses on the role of teacher reflection and similar dispositions is growing, a significant amount of research exists about a related construct, teacher beliefs, and its role in learning to teach. Beginning teachers' beliefs influence how they process new information and what they eventually learn (Richardson, 1996). Sources of teacher beliefs include cultural and family backgrounds; experiences with schooling and instruction, also known as their apprenticeship of observation (Lortie, 1975); and disciplinary, pedagogical, and pedagogical content knowledge (Richardson, 1996). Due to the strong influence of previous schooling experiences, many new teachers begin teacher education programs with teacher-centered views of instruction (McDiarmid, 1990), which influence their receptiveness to new program ideas (Calderhead & Robson, 1991) and reinforce the conservatism of practice (Ball & Cohen, 1999). Thus, it is important for teacher educators to confront teacher candidates' incoming beliefs and hold them up for examination (Fenstermacher, 1979; cf. Angell, 1998; Grossman, 1991; Stuart & Thurlow, 2000).

In history education, many novice teachers enter teacher education with previous schooling experiences that emphasized an objectivist view of historical knowledge (Slekar, 1998). The limited time preservice teachers spend in teacher education programs, which is often disconnected from classroom practice (Richardson, 1996), is usually not enough to overcome this apprenticeship of observation (Barton & Levstik, 2004). To move beyond views of teaching based on schooling experiences, new teachers must change not only their beliefs about history education, but also their purposes for teaching history (Barton & Levstik, 2004). Teacher education programs need to provide new

teachers opportunities to explore their prior beliefs and observe alternative approaches (Slekar, 1998).

Teachers' beliefs about their roles in secondary classrooms have a considerable influence on their instructional practices (Grant, 2003). Teachers who see themselves as "knowledge givers" (Grant, 2003) and students as recipients of that knowledge tend to teach the traditional narrative to students. They provide students with a predetermined interpretation of the past and rely on lectures and other teacher-centered methods of instruction. For example, van Hover and Yeager (2003) studied a novice teacher who believed that the purpose of teaching history was to instill truth in her students, and she relied on teacher-centered methods that emphasized lecturing and the textbook. Similarly, in a case study of a third year history teacher, Hartzler-Miller (2001) found that the teacher believed his role was to predetermine the content and significance of historical events for students and provide them with a coherent historical narrative. The teacher articulated that this approach aligned with his own experiences as a student because he had enjoyed the story-like historical narrative provided by his teachers. As a result, the teacher relied on his historical interpretations in the classroom rather than let students construct their own interpretations based on evidence.

In contrast teachers who see their roles as "knowledge facilitators" (Grant, 2003) provide students with opportunities to construct their own historical understandings. For example, Grant (2003) studied an experienced history teacher who stressed the importance of multiple perspectives in American history. She incorporated a variety of instructional strategies and assessments that engaged students in a process of analyzing multiple perspectives to construct and voice their ideas about social action. By involving

students in active discussion and writing assignments, the teacher made students responsible for their own learning and acted as a facilitator of their historical understandings.

In addition to beliefs about teaching, teachers' beliefs or perceptions about students and their abilities also play a significant role in shaping their instructional practices and can often present a great challenge in teaching historical thinking. Whereas many teachers try to incorporate critical thinking skills when working with high achieving students (e.g., higher track or honors classes), they have a tendency to rely on more rote learning and low level skills when working with struggling students (Oakes, 1985; Page, 1991). Case studies of both new and veteran history teachers have revealed that many do not use inquiry methods because they do not think their students are capable of more advanced work that requires critical thinking (Grant, 2003; Hartzler-Miller, 2001; van Hover & Yeager, 2003, 2004; VanSledright, 1996).

The role of teachers' visions in learning to teach. Teachers' visions of their instructional practices play an important role in how and what they learn (Darling-Hammond et al., 2005; Hammerness, 2003). Vision is another way to characterize teachers' ideal images of classroom practice (Hammerness, 2003). Hammerness (2001) describes three dimensions of vision: focus (the area of interest), range (the scope or extent of focus) and distance (how close or far teacher's practice is from his or her vision). The degree to which teachers reach their visions is a function of both the clarity of their vision and the amount of support they receive in their school context (Hammerness, 2001).

Teachers create their visions within particular school and district contexts, and these visions guide how they design instruction and assessments (Darling-Hammond et al., 2005). In creating a vision, teachers must consider their goals for instruction and how their chosen assignments and activities align with those goals. In history specifically, teachers must identify the key concepts or big ideas in the content and be familiar with inquiry methods that characterize the discipline. This will allow teachers to use standards strategically and to teach processes that reflect big ideas in the subject matter (Darling-Hammond et al., 2005).

The importance of strong disciplinary understandings. Effective history teachers need deep conceptual understandings of their subject matter (Ball & Cohen, 1999; Bransford et al., 2005). How teachers define their instructional goals is dependent on their understanding of the structure of the discipline and how knowledge is constructed in that field (Ball & Cohen, 1999; Grossman, Wineburg, & Woolworth, 2001; Wineburg, 2001). In teaching history, disciplinary understandings have a strong influence on instructional decision making (Wilson & Wineburg, 1988; Wineburg & Wilson, 1991). Teachers who have stronger disciplinary understandings have a framework for organizing knowledge and are prepared to help students learn modes of inquiry in the discipline (Yeager & Davis, 1996).

When teachers are versed in analyzing primary source documents and crafting historical arguments, they can better facilitate students' historical understanding. Preparing teachers to work with historical documents and then use them with students is critical for history education reform. Limited studies in teacher education have shown that preservice teachers lack experience with historical inquiry, analysis and writing

(Bohan & Davis, 1998; Yeager & Davis, 1995). If the majority of preservice teachers have limited experience in disciplinary history, how will they be able to teach students to read multiple sources of evidence and construct historical arguments? Having sufficient disciplinary knowledge is a prerequisite for teaching students how to think historically; however, it does not necessarily result in inquiry-based practices (Hartzler-Miller, 2001; van Hover & Yeager, 2003, 2004; VanSledright, 1996). Teachers must hold beliefs about the purposes of history education, beliefs about student learning, and a vision of instructional practice that align with their disciplinary understandings. Additionally, history teachers need to know how to transform their disciplinary knowledge and visions into instructional activities that help students *do* history and move to more sophisticated understandings (Bain & Mirel, 2006).

Pedagogical content knowledge: making content accessible to students. The knowledge needed to help students engage in modes of inquiry specific to a particular discipline is known as pedagogical content knowledge. Shulman (1987) defines pedagogical content knowledge as “the blending of content and pedagogy into an understanding of how particular topics, problems, or issues are organized, represented, and adapted to the diverse interests and abilities of learners, and presented for instruction” (p. 8). Teachers’ orientations towards the discipline guide their pedagogical selections and the way they represent material to students (Gudmundsdottir, 1990). In conjunction with their disciplinary knowledge, teachers use their knowledge of how students learn and their daily assessments of student learning to make instructional adjustments and further scaffold students’ learning. For example, in history education, teachers scaffold students’ reading of primary source documents by modeling reading

and annotation strategies and then guide students in their analysis. Teachers transform instructional objectives into historical problems, distinguish between history as event (past) and history as account (history), challenge students' assumptions and thinking about history, and provide them with the necessary tools and supports for historical thinking (Bain, 2005). To do this effectively, teachers need to understand how students learn the subject and what common misconceptions students face when learning history.

To make content accessible to students, it is important for teachers to have knowledge of learning theories and cognitive processes. A central tenet of learning theory is the importance of building on students' prior knowledge (cf. Bransford, Derry, Berliner & Hammerness, 2005; Donovan & Bransford, 2005). This includes having knowledge of students' interests, cultural backgrounds, literacy skills, and conceptions of the discipline. These incoming understandings will influence what and how students learn and how they assimilate and accommodate new information (Bransford et al., 2005). Teachers need to build on students' existing knowledge, anticipate students' misconceptions, and provide students with a framework for organizing new knowledge.

Tools for teaching historical thinking. Teachers need sufficient conceptual and pedagogical resources when aiming to enact reform-based practices (Grossman et al., 1999; Hammerness et al., 2005). Conceptual tools include frameworks, theories and ideas about teaching and learning (Grossman et al., 1999). In history education, this might include teaching history as an interpretive discipline or aligning assessments with goals for student learning. Pedagogical tools are more practical for use in the classroom and include curriculum materials and resources. When teaching historical thinking,

pedagogical tools include edited primary and secondary source documents, ready-made inquiry lessons, and authentic assessments that align with inquiry activities.

Available materials present a challenge for teachers who are typically provided district-adopted textbooks as the primary resource in the classroom. Textbooks by nature are a-historical resources—they are authorless texts written in an authoritative style (Paxton, 1999). Unlike historians, textbook authors do not provide a chain of evidence for the claims presented. If teachers want their students to engage in historical inquiry, they must find primary and secondary sources for student readers. Because many students lack proficient literacy skills, teachers must also create reading scaffolds to aid student comprehension and design writing scaffolds to aid student analysis. This takes quite a bit of time and effort that teachers (especially novices) do not have (Martin & Monte-Sano, 2007).

The role of context in the development of new history teachers. Teachers’ practices are shaped by their visions of good teaching, tools, understandings, and beliefs, which develop within multiple contexts. Teachers learn and develop their practices in a number of contexts that range from teacher education to collaborative teaming structures in schools to professional networks outside of schools. The local context, including organizational structures, culture, and norms (Hargreaves, 1994; Little, 1982), and subject-specific departments (McLaughlin & Talbert, 1993) have a significant influence on teachers’ practices and decision making. In this study’s conceptual framework (see Figure 1), I use the term *context* as opposed to *community* to indicate these influences. Joel Westheimer (2008) defines teacher professional community as “a group of teachers engaged in professional endeavors together (those endeavors oriented specifically around

teacher work)” (p.757), and he defines a teacher learning community as “a subset of the former group—those specifically focused on learning with and from colleagues” (p.757). Although I had hoped that teachers in this study would be members of professional communities, all three participants worked in isolation from colleagues and were not true members of communities who engaged in work with colleagues. In an effort to stay close to the data, I decided to use the term *context* to describe these influences since I did not observe teachers working in professional or teacher learning communities.

Teacher education and the development of beginning teachers’ practices. One particularly important context is teacher education. While the influence of teacher education has traditionally been perceived as a relatively weak intervention (Kennedy, 1999; Zeichner & Gore, 1990), some studies have demonstrated the important role that teacher education plays in developing teachers’ disciplinary and pedagogical content knowledge (Grossman, 1990). Recent research has begun to focus on the substance and coherence of teacher education programs rather than structural differences (e.g., alternative certification vs. traditional undergraduate programs, etc.). Important characteristics of the substance of teacher education programs include the content of the program (e.g., working with diverse student populations, developing higher order thinking skills, constructivist teaching methods); the learning process (e.g., critically examining views about teaching and previous schooling experiences, coursework concurrent with field experiences); and the learning context (e.g., learning in inquiry communities) (Darling-Hammond & Hammerness, 2005). Within these broader characteristics of teacher education programs, researchers have specifically examined the influence of methods courses and field experiences on new teacher learning.

Research on methods courses and field experiences. The goals of preservice education are for teachers to refine beliefs about teaching and learning; develop subject matter knowledge (both disciplinary and pedagogical content knowledge); expand their understanding of learners and learning; and acquire tools and expertise to enact and study teaching (Feiman-Nemser, 2001a). While novice teachers primarily develop subject matter knowledge in their course work, they develop general pedagogical strategies, survival skills, and knowledge about students in their field experiences (Grossman & Richert, 1988). Although the influence of methods courses on initial teaching practice is somewhat limited, evidence from longitudinal studies suggests that knowledge and tools learned in methods courses may reappear after the first year of teaching (Grossman, Valencia, Evans, Thompson, Martin, & Place, 2000). Thus, it is important to further examine what influences from teacher education remain and/or recede when new teachers transition from student teaching to the first few years of practice.

Learning to teach history in preservice education. Within social studies and more specifically history teacher education, research that investigates methods courses and subsequent field experiences for preservice teachers is limited (Clift & Brady, 2005). Few studies give insight into how teacher candidates learn disciplinary concepts and discipline-specific pedagogical strategies in preservice education and how they then apply these ways of knowing to their own instructional practices.

Knowledge of the discipline is an essential factor in learning to teach history; however, many preservice teachers struggle with their own misunderstandings of historical inquiry (Fallace, 2007). Preservice teachers enter their teacher education programs with their own beliefs and values about education, which have been influenced

by their apprenticeship of observation. Learning to teach history as an inquiry process requires beginning teachers to think about methods of teaching that are quite different from their own learning experiences. This is challenging when many teachers learned history as lecture, memorization, and recitation of information. When preservice teachers lack experience in historical inquiry and historical writing, they enter teacher education with superficial disciplinary understandings, which affect their ability to design and scaffold instruction (Bohan & Davis, 1998; Seixas, 1998; Yeager & Davis, 1995). This lack of disciplinary knowledge is exacerbated when methods courses fail to help new teachers learn what it means to *know* in history and how to design instruction that is aligned with the structures of the discipline.

Even when preservice teachers learn disciplinary modes of inquiry in their methods courses, a gap often still exists between their knowledge and practice. For example, Fehn & Koeppen (1998) examined the influence of a history-intensive methods course on student teachers' beliefs and use of document-based instruction. They found that although the student teachers all had positive attitudes towards using documents, they questioned their ability to incorporate these teaching strategies in the classroom. Socializing forces in student teachers' field experiences, concerns over classroom management, and curriculum coverage complicated their use of historical documents during instruction. Even though new teachers may demonstrate knowledge of the discipline and believe inquiry-based instruction is best for students, they may still enact contradictory practices because of challenges that they encounter in their field experiences (Fehn & Koeppen, 1998; Wilson, Konopak, & Readence, 1994).

The influence of socialization in student teaching. When assessing the relationship between teacher education and new teacher learning, it is important to separate the influence of coursework from the impact of student teaching (Zeichner & Gore, 1990). Socializing forces in the school context, such as cooperating teachers and school policies, play a central role in influencing new teacher learning because they can either reinforce or change student teachers' existing ideas (Adler, 1991). When student teachers begin their field experiences, they often face the challenge of balancing the instructional practices espoused by their teacher education program with the practices encountered in their mentor teacher's classroom. More often than not, a mentor teacher's practices do not align with those pedagogies supported in the student teacher's coursework (Goodlad, 1984). This discrepancy becomes problematic when new teachers want to try to implement innovative instructional methods but feel constrained by their mentor's approach.

Researchers who have studied student teachers have found that teacher socialization has a powerful influence on their learning and instructional decision making. Student teachers often rely on the mentor's instructional methods to maximize comfort and avoid conflict (Koeppen, 1998; Wilson, Konopak, & Readence, 1994). In history classrooms, this tendency results in teacher-centered instruction, an emphasis on the textbook, and reliance on worksheet assignments (Koeppen, 1998; Wilson et al., 1994). Mentor teachers may pressure student teachers with time constraints and concerns over curriculum coverage or simply not allow student teachers the freedom to try new methods of instruction (Koeppen, 1998; Grossman et al., 2000). Consequently, these

socializing forces significantly influence student teachers' thinking and instructional planning.

Once student teachers transition to their first year of teaching, they have the autonomy to be the sole instructional decision makers in the classroom. One would assume that new teachers who were trained in inquiry-based pedagogies in teacher education could then implement these practices in the classroom. However, beginning teachers continue in their struggle to teach history in ways consistent with the discipline. This problem of enactment combined with the complex nature of teaching and student learning present significant challenges for new teachers (Bransford et al., 2005).

Transitioning to beginning teaching: the challenges of teaching historical thinking in school and district communities. Making the transition from teacher education to full-time teaching is a complex and stressful process for novice teachers. This phase of induction is defined by Feiman-Nemser (2001a) as “a shift in role orientation and an epistemological move from knowing about teaching through formal study to knowing how to teach by confronting the day-to-day challenges” (p. 1027). In history education, teachers shift from learning about and understanding the structure of the discipline to teaching students what it means to think historically. This transition from learning to teach in teacher education to learning to teach in school and district contexts presents a number of challenges.

The challenge of working within school and district contexts. One significant challenge to implementing reform-based practices in history is the school and district context. Cultural norms in schools provide either supportive or unsupportive environments for teachers' work. If a school culture is unsupportive of innovative

practices, it makes it especially difficult for teachers to feel empowered to go beyond traditional modes of teaching (van Hover & Yeager, 2003). In history coverage pressures and time constraints make it difficult for teachers to use inquiry-based approaches (van Hover & Yeager, 2003, 2004). Historical thinking requires in-depth exploration of topics, making it impossible to cover everything in the curriculum.

Lack of collaboration among colleagues may prevent new teachers from being able to sustain practices that may be difficult to enact without support and feedback from more experienced colleagues. If teachers are required to use departmental exams that correlate with information in the textbook and emphasize an objective view of history, they may not feel comfortable straying from teaching methods that cover what students need to know for the test (VanSledright, 1996). Furthermore, teachers may sense that other social studies teachers, as well as parents, expect students to learn a factual retelling of history (VanSledright, 1996). These school influences present challenges for teachers who want to move away from traditional history teaching practices. Increasingly, state imposed high-stakes assessments have also heightened pressures to cover the curriculum and to assess students using objective measures that reinforce the traditional narrative.

Education policy and the influence of state testing on teaching practice. The influence of policy factors, such as high-stakes testing and curriculum standards, has received increased attention in recent history education research because it presents yet another challenge for teachers who desire to teach historical thinking using inquiry methods. High-stakes assessments are often constructed of objective, multiple choice questions, which run counter to historical thinking. Many teachers maintain the perception that traditional instruction is necessary to prepare students for high-stakes tests

even though research has shown that student performance on these assessments remains poor (Wineburg, 2004). Decades of poor student achievement on these norm-referenced history tests supports the argument that teaching students to memorize random facts is not an effective way to foster student learning. Coverage is not the same as student learning. However, since these tests are prevalent measurement tools and allow teachers to cover a lot of factual material, teachers continue to assess student learning using these objective measures.

With the escalation of high-stakes testing and the influence of state standards in driving the curriculum, concerns have risen over how these policy factors influence history teachers' instruction. State tests often present a conflict between teachers' goals for student learning and policymakers' goals for student achievement (Grant, 2005; Salinas, 2006; VanSledright & James, 2002). Many teachers contend that tests do not align with the curriculum (Segall, 2003) and that they are not an adequate measure of student understanding (Gradwell, 2006; Grant et al., 2002).

Research on standardized tests shows a relationship between teachers and testing that is "nuanced, multifaceted, complex, and contradictory" (Segall, 2003, p. 290). Teachers act as instructional "gatekeepers" (Thornton, 1991) in deciding what and how to teach, and these decisions are influenced by outside factors, such as testing and standards. The degree of influence on teachers' practice varies from being relatively minimal to being rather significant (Grant & Gradwell, 2005). High-stakes tests heighten teachers' concerns about coverage (van Hover & Heinecke, 2005; VanSledright & James, 2002) and influence the selection of content to be covered (Grant, 2006; van Hover, 2006), but

they appear to have less influence on teachers' instructional methods (Gradwell, 2006; Grant, 2006; Grant et al., 2002).⁴

Teaching Historical Thinking: Implications for Future Research

The previously reviewed research provides insight into the challenge of reforming history education. While traditional teaching practices have continued to dominate, reform efforts envision an innovative approach to instruction where teachers engage students in historical analysis and interpretation. To minimize the gap between school history and disciplinary history, teachers need a strong understanding of the discipline and know how to translate their understandings into developmentally appropriate practices for their students. This stresses the importance of teacher education and preparing teachers to enact practices in challenging school contexts. Limited studies in history education describe efforts to prepare teachers to teach historical thinking or provide detailed cases of what it means to teach historical thinking in secondary classrooms. Building on previous research, this study responds to these limitations by examining the practices and decision making of three beginning teachers who graduated from a discipline-specific teacher education program that emphasized historical thinking. The study is guided by the following two research questions: 1) How do graduates of a discipline-based teacher education program teach history? 2) What factors influence how new teachers' teach historical thinking? How?

To a large extent the research in history education and teacher education consists of qualitative case studies. Case study methodology has its advantages because it provides a means for studying how teachers learn to teach and how they enact discipline-

⁴ More research is needed in this area. However, this study examines the practices of three teachers in a state where history is not tested on high-stakes standardized tests. Although the policy context is important for research in history education, it is beyond the realm of this particular study.

based practices. Qualitative methods allow the researcher more insight into how and why teachers do what they do in the classroom. Although these methods have their limitations (e.g., lack of generalizability and/or reliability), they serve as a model for this study.

One important factor that influences teacher learning and decision making is teacher education. When examining its impact on new teachers, it is important to observe from inside the program so that valid claims can be made about the extent of its influence. Of the studies included in this review, many fail to delve into the “black box” of teacher education. Some authors make claims about the influence and substance of methods courses without sufficient evidence (Fallace, 2007; van Hover & Yeager, 2003) or by relying on retrospective data collection (Grossman et al., 2000). Particularly in the history-specific literature, methods courses are identified as emphasizing inquiry or document-based instruction, but studies lack detailed information about how instructors communicated these ideas to teacher candidates (Fallace, 2007; van Hover & Yeager, 2003). This study addresses these gaps by following teachers through the duration of their methods courses and field experiences and by providing descriptions of these experiences in the methods chapter.⁵

Additionally, only a few studies follow student teachers into their initial years of teaching (e.g., Grossman et al., 2000), and within social studies education, limited research has explored the instructional practices of preservice or beginning teachers (e.g., van Hover & Yeager, 2003, 2004). More importantly, no longitudinal studies have followed history teachers throughout their teacher education program and into their first years of teaching. To better understand how teachers learn to teach historical thinking and

⁵ This study initially observed teacher candidates in their other teacher education courses (e.g., diversity and action research), but the data collected was not relevant to these particular research questions.

the factors that influence their instructional decision making, this study considers a more comprehensive continuum of teacher learning.

This study provides additional insight into instructional reform by examining the practices of three first year teachers who graduated from a discipline-based teacher education program. The program's methods courses emphasized teaching historical thinking and how to make discipline-specific strategies accessible to students. Following their completion of the program, the three participating teachers then entered various school and district contexts that did not necessarily support or prioritize goals that aligned with historical thinking. These are their stories and hopefully they will offer insight into how we as researchers and teacher educators can better prepare new teachers to act within difficult contexts and become advocates for change in how history is taught in schools.

Chapter 3: Methodology

Design

This research study uses an exploratory case study design to examine the teaching practices of three first year teachers. Yin (2003) defines a case study as “an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident” (Yin, 2003, p. 13). I chose this method of inquiry because it allowed me to investigate beginning teachers’ practices within embedded and overlapping contexts (cf. Patton, 2002; Yin, 2003, 2006). The research design is grounded in exemplary models of case study research that have evaluated the influence of teacher education on the learning and instructional practices of novice teachers (e.g., Grossman, 1990; Grossman et. al, 2000). Building from these studies, I examine how three teachers who graduated from a discipline-specific teacher education program taught historical thinking and what factors influenced their instructional decisions in their first year of teaching.

I conducted this research as part of a larger teacher education study directed by Dr. Chauncey Monte-Sano at the University of Maryland. This study followed a cohort of aspiring social studies teachers through their teacher education program and into their beginning years of teaching. As a research assistant, I had the opportunity to collect background data on each teacher during the teacher education phase of the larger study. Although I used the teacher education data to develop the context for this study, my main data source is from year two of the larger research project during which we followed graduates into their first year of teaching.

Context of Teachers' Learning

Prior to examining first year teachers' instructional practices, I wanted to learn about the contexts in which they learned to teach. In the early phases of designing this study and prior to selecting the participant group, I followed a cohort of ten teachers who had enrolled in a teacher education program that emphasized discipline-specific teaching methods (i.e. historical thinking). To understand teacher candidates' learning experiences and the influences on their instructional decision making, I immersed myself in the program to learn firsthand about their coursework and internships.⁶

Program summary. I studied teachers enrolled in an alternative teacher preparation program at a large, public university in the Mid-Atlantic region. The program led to eligibility for state licensure to teach secondary social studies and a Master's of Education degree. The program emphasized courses in discipline-specific teaching methods, reading, diversity and action research; teachers did not take specific courses in learning theory, special education, or assessment. The university offered two different routes for completion: a 13-month full-time graduate program and an integrated undergraduate/graduate program.

Prospective teachers who enrolled in the 13-month graduate program began course work in the summer and completed four courses during an eight week period. Prospective teachers who selected the integrated route completed one methods course (along with three other teacher education courses) as an undergraduate and then joined the Masters' cohort in the fall following graduation. During their fall and spring semesters, all preservice teachers interned in secondary schools during the day and

⁶ See the data collection section for details about when and how I collected data.

enrolled in graduate courses at night. By integrating course work with internship experience, the program aimed to allow teachers to connect theory with practice.

In this study, two of the three participating teachers (Steve and Bryan) completed the 13-month graduate program, while one participant (Maya) completed the integrated undergraduate/graduate program.⁷ The structure of the program required teacher candidates to complete three courses in teaching methods. The undergraduate course (which was intended to be the equivalent of the graduate summer course) was a generic social studies methods course that did not emphasize disciplinary ways of thinking in history.⁸ However, all three graduate methods courses focused specifically on teaching and learning history. The summer introductory graduate course provided teacher candidates with a foundation for thinking about the structure of the discipline; the fall and spring courses gave teacher candidates the opportunity to extend their disciplinary understandings and transfer their knowledge to the planning and enactment of instruction. The program emphasized history over other social studies disciplines for multiple reasons: 1) most secondary social studies teachers are required to teach a history course, and 2) there is a breadth of research in teaching and learning history but little research in other disciplines, such as government and economics.

Transforming teacher candidates' ideas about history. Many preservice social studies teachers enter teacher education programs with previous schooling experiences that emphasized history as an objective field of study (Slekar, 1998). To change teachers' incoming beliefs about what it means to *know* in history, the methods course instructors

⁷ All names in this study are pseudonyms.

⁸ Maya completed the undergraduate social studies methods course, but I did not have the opportunity to observe the course for this study.

confronted teachers' apprenticeship of observation⁹ and argued that school history should reflect discipline-based practices. The summer course instructor recognized the need to provide teacher candidates with a new way to think about history and wanted to expose them to a certain level of "cognitive dissonance" by asking questions about what it means to know and teach the discipline. One of the instructor's goals was to get teachers "to start grappling with epistemological questions about the nature of the domain so that...we can then start grappling with more practical, pragmatic sorts of questions about what it means to teach and learn in the domain" (Interview, 08/08/07). He had teachers read books (e.g., Davidson & Lytle, 2004 and Wineburg, 2001) that challenged their previous conceptions of history and introduced them to discipline-specific concepts, such as evidence, sourcing, and contextualization. After teacher candidates read the introductory chapters to *After the Fact: the Art of Historical Detection* and *Historical Thinking and Other Unnatural Acts*, the instructor highlighted the process of doing history:

INSTRUCTOR: A lot of people think historians are couriers of the past. How would you describe what historians do?

STEVE: They construct history from evidence they have...

INSTRUCTOR: They (Davidson and Lytle) used selection, analysis and writing as three interrelated processes that historians do. Not the past but a process of taking residue from the past and turning it into something meaningful... And how do you know what's important to a particular inquiry? To a particular narrative interpretation? ... Process of doing history is digging and digging until you find what's out there. (Field notes, 06/19/07)

⁹ The concept, the apprenticeship of observation, is described in the literature review. To briefly recap, the apprenticeship of observation, a term coined by Dan Lortie (1975), refers to an individual's previous experiences with schooling and instruction, which tend to reinforce conservative teaching practices.

The instructor emphasized the investigative processes of historical study and introduced the question, “how do you know?” to teacher candidates. Throughout the course, he returned to this question of knowing in history to reiterate the importance of grounding claims in evidence. For example, he had teacher candidates read trial testimonies recounting the Boston Massacre and then corroborate across accounts to answer the question, “Why did the Boston Massacre happen and who bore responsibility for it?” He instructed teacher candidates to attend to two important questions during the inquiry process: 1) what do you know? and 2) how do you know? By engaging teacher candidates in this process of doing history, the instructor helped develop their understanding of the discipline.

Teacher candidates continued to engage in discipline-based practices and historical thinking throughout their methods courses as instructors modeled various inquiry-based teaching practices. For example, the fall methods instructor began the course by engaging teacher candidates in an Opening up the Textbook (OUT)¹⁰ activity (cf. Martin & Monte-Sano, 2007). After teachers had read *The Montgomery Bus Boycott and the Women who Started It* by Jo Ann Robinson, the instructor asked them how the book supported or challenged their existing knowledge of the boycott. Teachers shared their reactions to the book and how it provided more contextual information about the boycott in a personalized account. Some teachers admitted to thinking that Rosa Parks had started the whole movement but that the book opened their eyes to the level of organization and number of actors involved in the planning process. After reading a

¹⁰ In an Opening up the Textbook lesson plan, students read a textbook excerpt in addition to one primary or secondary source document. This document can serve one of many purposes: to challenge the textbook account, to vivify or breathe life into an account, to compare accounts, or to articulate voices silent in the textbook. The overall purpose of this type of lesson plan is to expose the epistemological problems in textbooks and to challenge students’ perceptions that it contains the “right” answers.

textbook account of the boycott, teacher candidates identified problems with the account (e.g., oversimplification) and selected an excerpt from the book that challenged the problem and offered additional insight. By engaging teacher candidates in an abbreviated OUT activity, the instructor problematized relying on textbooks as *the* source of information in secondary classrooms and provided teachers with a practical tool for engaging students in a similar learning activity.

In addition to the OUT lesson plan, the fall methods instructor modeled a number of other lesson activities that emphasized historical thinking. These included lessons in historical reading strategies, such as sourcing and contextualization, and an inquiry lesson. In an inquiry lesson, students are presented with an inquiry question and test and revise answers to that question based on historical evidence. The instructor modeled this process for teacher candidates by presenting them with the question, “Why did the US invade Cuba in 1898?”¹¹ Teacher candidates made initial hypotheses and engaged in a process of reading primary source documents and revising their hypotheses. They worked in groups to read the documents; answered close reading, sourcing, and contextualization questions for each source; and completed a document chart in which they identified the date, author, causes for the invasion suggested by the document, and evidence to support those causes. After reading multiple rounds of evidence, teacher candidates responded to the following prompt in writing: “The explosion of the USS Maine caused the U.S. to invade Cuba in 1898. Evaluate the statement. Agree? Why or why not? Cite evidence.” (Field notes, 10/23/07). By engaging in the inquiry lesson as students, teacher candidates learned firsthand what it meant to inquire into history and construct interpretations based

¹¹ The course instructor helped develop an online resource, *Historical Thinking Matters*, which provides sample inquiry lessons for teachers. The lesson on the Spanish American War is one of them.

on multiple sources of evidence. This activity not only provided teachers with practical tools when teaching U.S. history, but it more importantly equipped them with conceptual tools for approaching history instruction as an inquiry process.

Attention to student thinking. Without a separate course in assessment that focused teacher candidates' attention on student understanding, the fall and spring methods courses assumed the role of developing teacher candidates' pedagogical content knowledge by directing their attention to how students learn and think in the discipline. Teachers analyzed how students typically think in history and the challenges they face in making the epistemological shift from viewing history as a fixed story to seeing history as constructed.

The instructor provided teacher candidates with a number of assignments to help them *see* student thinking. Teacher candidates read research in history education (e.g., De la Paz, 2005; Epstein, 2000; Lee, 2005) that examined how students think about second order concepts (e.g., cause, evidence, and significance) and how they write in history. Teachers worked with individual students to read and discuss primary and secondary sources using think aloud¹² exercises (cf. Pressley & Afflerbach, 1995), which gave them the opportunity to assess how students read and think in history. Additional activities intended to *see* student thinking included discussions, written assessments and projects. Teacher candidates learned how to implement discussion-based lessons, such as Socratic seminars and Structured Academic Controversies.¹³ The courses highlighted the

¹² A think aloud is a process in which the student is to "think aloud" while reading a text to share his/her thoughts that come to mind while reading. The teacher's role is to guide the thinking process and prompt questions when needed.

¹³ In a Socratic seminar students discuss a text while the teacher acts as facilitator. A Structured Academic Controversy is not a debate but rather a forum for discussing controversial issues while trying to reach a consensus (Johnson & Johnson, 1988). An example question used for this activity is "Was Abraham Lincoln a racist?"

importance of authentic assessment as the fall/spring instructor invited guest speakers to discuss how to incorporate project-based learning, such as National History Day,¹⁴ into the classroom. Teacher candidates read and evaluated examples of students' historical writing and learned strategies (e.g., annotating documents, writing thesis statements, outlining essays) to scaffold their writing. Historical thinking, both in the design of instruction and attention to student thinking, remained a consistent emphasis throughout the methods sequence.

Participants

Three teachers working in two neighboring Mid-Atlantic school districts participated in this study. Participants satisfied the following key criteria: 1) Each teacher completed the same university-based Masters plus certification teacher education program via the regular 13-month or integrated route; and 2) Each teacher taught at least one secondary level United States history class.¹⁵ The following sections explain in further detail each teacher's background, teacher education experience and school context.

Steve. Steve matriculated in the teacher education program the summer following the completion of his undergraduate degree in history at the same university. He entered the program with well developed disciplinary understandings and a self-proclaimed love

¹⁴ National History Day is a program that aims to engage secondary students in historical inquiry. Each year a new theme for historical investigation is introduced, and students create websites, documentaries, exhibits, or performances to present their historical interpretations. Teachers can integrate these projects and historical themes into their daily curriculum.

¹⁵ In theory I wanted to follow three teachers who taught the same course (e.g., 9th grade U.S. history) and who experienced the same teacher education program (i.e. 13-month program or integrated route), but this was not possible. Of the ten teachers who graduated from the university-based teacher education program that I had observed for the larger study from 2007-2008, only five teachers stayed in the region and taught a history class. Of these five, two (one integrated and one 13-month program graduate) taught 8th grade U.S. history and two (again one integrated and one 13-month program graduate) taught 9th grade U.S. history. For practical reasons (e.g., schedule overlap) I could only follow three of these four teachers for this study.

for history. Steve participated in National History Day (NHD) as a middle and high school student, and in college he taught workshops on documentary filmmaking and historical research to local high school students participating in NHD. He had a strong understanding of the constructed nature of the discipline, but he had separated in his mind disciplinary history from school history. Steve reflected in an interview that the methods courses helped him bridge that gap as he learned how to design lessons that engaged students in authentic historical analysis.

During his teacher education program, Steve interned at a large, ethnically diverse high school in Carrollton County Public Schools (CCPS) and taught multiple sections of a 9th grade honors U.S. history course. He integrated historical analysis into his units and incorporated writing assignments to assess student understanding. He had the regular support of a mentor teacher, but as reported by Steve, she used more traditional teaching practices and assessments, such as direct instruction and multiple choice exams. Steve did not have support from other teachers in the department to incorporate historical thinking in his classroom. He reported that his university supervisor, although supportive, focused more on Steve's classroom management and interactions with students than on his instructional design and historical thinking.

After graduating from the teacher education program, Steve earned a job at Lincoln Middle School, comprised of predominantly Caucasian students in Carrollton County, and taught 8th grade U.S. history in three heterogeneously grouped classes in addition to one 7th grade world history course.¹⁶ Steve described his social studies

¹⁶ To be more specific, Lincoln Middle School had a population of approximately 918 students: 71% White, 13% African American, 8% Hispanic, and 8% Asian. Steve's classes were not labeled as honors or on-level and included students who achieved at different levels. In 2008-2009 (the year of this study), 7.9%

department as supportive, but they did not collaborate regularly. The department met once a month and the 8th grade U.S. history teachers met weekly. However, the U.S. team meetings occurred during 4th period when Steve had to teach a class so he did not have the opportunity to participate. The other 8th grade team teachers provided Steve with weekly agendas and daily objectives that prescribed what content to teach, and he tried to adhere to those regularly.

Bryan. Bryan entered the teacher education program after deciding to make a career change. He had worked for a public relations firm after graduating from a small private university with a double major in communications and government and a minor in journalism. He entered the teacher education program with a vision of social studies education that prepared students to be active citizens. Because Bryan did not have a strong background in historical study, he began the program with a limited understanding of the discipline and saw history as facts from the past. However, throughout the program, Bryan developed his knowledge of the discipline and came to understand the importance of multiple perspectives and evidence in history. He advanced his pedagogical content knowledge and learned how to teach historical thinking by incorporating primary source documents and inquiry lesson plans into his field placement.

Bryan interned in CCPS at Johnson High School, which had a student population comprised of 88% students of color and 43.7% students who were eligible for the FARMS program. He had a unique student teaching experience in which he worked part-

of students at Lincoln were eligible for the Free and Reduced Meals Program (FARMS). Additionally, although Steve taught four classes, he was considered part-time because he did not teach five class periods.

time as a paid intern teaching an AVID¹⁷ course and then spent the majority of his time with his mentor who taught honors U.S. history and on-level and honors government. Although his mentor's teaching style differed from his own (i.e. his mentor took a didactic approach to instruction and prioritized preparing students for the state government exam), Bryan had some autonomy when teaching and worked collaboratively with his mentor to plan instruction. Similar to Steve, Bryan reported that his university supervisor focused on classroom management and his interactions with students rather than how he designed instruction from a disciplinary perspective.

After completing the Masters program, Bryan remained at Johnson High School for his first year of full-time teaching. He taught two on-level U.S. history classes in both the fall and spring semesters.¹⁸ Bryan described his social studies department as “artificial” and untrustworthy and decided to avoid interactions in the teachers’ lounge. His department and the U.S. team each met once a month, and meetings were short and more administrative in nature (e.g., deciding on testing dates and weekly agendas). Bryan spent most of his time, both during and after school, working with his students, and when he needed advice or support, he often consulted his former mentor teacher or a former university instructor who also worked in the social studies department at Johnson.

Maya. In contrast to Steve and Bryan, Maya completed the integrated teacher education program in which she took four education courses as an undergraduate and then joined the rest of the Masters cohort in the fall following graduation. Maya graduated with a degree in government and minors in Spanish and education. As a

¹⁷ AVID, which stands for Advancement Via Individual Determination, is a program designed to help underachieving middle and high school students prepare for and succeed in college.

¹⁸ Bryan also taught one section of government, one section of yearbook, and one section of AVID. Students switched classes at the end of the first semester so Bryan had many new students to start the 2nd semester in January.

woman of color, she had a strong desire to work with and serve as a role model to students from diverse backgrounds. She expressed her wish to increase student motivation in struggling public schools. With limited background in the subject, Maya entered the program with an understanding of history as “fact or fiction,” but she also understood the important role of perspective in analyzing the past. During the program, she advanced her understanding of historical thinking and learned how to teach strategies, such as sourcing and perspective taking, to her students.

Maya’s field experience during the program was challenging. She worked as a paid intern at Hoover High School,¹⁹ which served a majority of African American students, in Westfield County. Because she worked as a paid intern, she did not work side by side with a mentor teacher. From day one, Maya was the teacher of record in two U.S. history courses and one sociology course.²⁰ She still had a mentor teacher who met with her to provide encouragement and feedback on her lessons, but because of his own teaching schedule, he did not observe her regularly. This mentor-intern structure left Maya isolated and with little support when she faced challenging circumstances in her classes. At one point in the fall, she wanted to quit the program, but with support from her university supervisor, instructors and mentor, she was able to finish the program successfully.

Maya remained in Westfield County for her first year of full-time teaching, but she transferred along with her mentor teacher to North Park High School (NPHS).²¹ This

¹⁹ Hoover High School had 1961 students: 84% African American, 7% Asian, 6% Hispanic, and 2% White. Hoover High had 31.9% of students eligible for FARMS. During Maya’s internship year, the principal was fired mid-year, and the principal who assumed the position remained for only one year.

²⁰ As a paid intern, Maya assumed half of a regular 6-period teaching load.

²¹ North Park High School served 2172 students: 47% Hispanic, 44% African American, 5% Asian, and 4% White. They had 53.4% students eligible for FARMS.

school also served students from diverse backgrounds and Maya taught multiple sections of on-level U.S. and World History. In contrast to Maya's experiences at Hoover, she described the staff and teachers at North Park as more welcoming and supportive. Although Maya considered NPHS to be a friendlier environment, the social studies department did not work collaboratively to plan or analyze instruction. Teachers within the department met monthly, but their conversations emphasized administrative issues rather than teaching and learning.

Data Collection

To better understand how new teachers were able or unable to use reform-minded teaching practices in history, I needed to know more about teachers' individual characteristics (e.g., their disciplinary knowledge and beliefs about teaching) and the contexts (e.g., teacher education, field experience, and department culture) in which they learned to teach. This study relied on multiple methods of data collection including observations, interviews and documents (see Table 1). As part of the larger research project, I collected teacher education data from June 2007 to June 2008, and after selecting three case study participants for this study, I continued data collection from September 2008 until April 2009.

Table 1

Teacher Data Collection

Data	When collected?	Relevant research question(s)	How analyzed?
Observations of teacher candidates in methods courses	June 2007- May 2008	What factors influence how new teachers' teach historical thinking?	-Multiple analytic passes, initial coding -Pattern coding -Analytic memos -Explanation building
Observations of teacher candidates in internships	January 2008 March 2008	What factors influence how new teachers' teach historical thinking?	-Multiple analytic passes, initial coding -Pattern coding
Teacher education coursework	June 2007- May 2008	What factors influence how new teachers' teach historical thinking?	-Multiple analytic passes and initial coding -Within and across case pattern coding on key pieces of data
Teacher pre- and post- assessments	June 2007 May 2008	What factors influence how new teachers' teach historical thinking?	-Multiple analytic passes -Within and across pattern coding
Unit observations (2 units per teacher)	September 2008- March 2009	How do graduates of a discipline-based teacher education program teach history? What factors influence how new teachers' teach historical thinking?	-Multiple analytic passes and initial coding -Within and across pattern coding -Testing propositions, searching for alternative explanations -Explanation building
Classroom assignments, materials, and assessments	September 2008- March 2009	How do graduates of a discipline-based teacher education program teach history?	-Multiple analytic passes -Testing propositions, searching for alternative explanations
District/school documents	September 2008- March 2009	What factors influence how new teachers' teach historical thinking?	-Multiple analytic passes

Teacher interviews (teacher education and first year of teaching)	August 2007-April 2009	How do graduates of a discipline-based teacher education program teach history? What factors influence how new teachers' teach historical thinking?	-Multiple analytic passes and initial coding -Within and across pattern coding -Testing propositions, searching for alternative explanations -Explanation building
Teacher ranking exercise	October 2008-April 2009 (during post-unit interviews)	What factors influence how new teachers' teach historical thinking?	-Testing propositions, searching for alternative explanations -Explanation building

Observations. To understand how Steve, Bryan, and Maya learned to teach historical thinking, I observed the majority of their social studies methods courses in conjunction with the larger research project. I observed 7 three-hour methods classes in the summer and 12 in each of the fall and spring semesters for a total of 31 methods course observations.²² I also observed teachers at their field placements two times to learn about their internship experiences.

To learn how Steve, Bryan and Maya then taught history in their first year of teaching, I observed two units of instruction in each teacher's classroom. I selected one unit in the fall semester and one in the spring because this allowed me to see growth over time. Since Maya and Bryan taught the same U.S. history course (1865 to the present), I observed similar units to make comparisons between teachers. Although I wanted to observe topics of personal interest (e.g., Great Depression and Civil Rights) and avoid

²² I did not observe Maya's first methods course because it took place during her junior year of undergraduate education. I did locate a syllabus and talk to faculty in the department to learn more about the course. I also observed a number of other teacher education courses (e.g., reading, diversity, action research) during the 13-month program, but after multiple observations I learned they were not as relevant to my research questions. These limited observations and acquisition of course handouts provided sufficient information about if and how teachers learned to assess student learning.

units that focused on specific wars, the organization and timing of the districts' curricula did not allow me to do so. Thus, I based my unit selection on my availability and the teachers' schedules.²³ To maintain consistency and to see how each class flowed to the next, I observed the same class period every day to the extent that it was possible.²⁴

I observed Bryan and Maya's U.S. imperialism (and more specifically the Spanish American War) and World War II units (see Table 2 for frequency of observations). Bryan's school had a modified block schedule so I observed four 50-minute periods and three 65-minute periods during his imperialism unit. Maya's school had a regular block schedule, and I observed seven 85-minute periods.²⁵ While Maya's imperialism unit focused solely on this topic, Bryan's unit was part of a larger foreign policy unit that included World War I. For this first unit, I decided to observe only topics related to the Spanish American War and U.S. imperialism in order to make fair comparisons. However, after these initial observations I thought that I had lost a sense of continuity in Bryan's unit by not seeing the end and how he connected themes of U.S. imperialism to World War I and his summative assessment. Thus, I made adjustments for the second unit on World War II and observed it from beginning to end despite differences in duration between teachers. I observed ten 45-minute periods, four 90-minute periods, and

²³ Each teacher had preferences for when I could observe. Maya did not want to start observations until November because of other school commitments in the fall so the earliest unit to make comparisons with Bryan was the Spanish American War unit. I chose to observe this unit because I did not want to delay data collection any further. Although I wanted to observe the Great Depression or Civil Rights units, the timing of these units in December and May was not manageable. Steve's curriculum was organized into four large units (one for each quarter) so I chose a series of lessons within two of the larger units for the 1st and 3rd quarters.

²⁴ Bryan and Maya's morning history classes conflicted during the 2nd semester so I had to make adjustments to my original data collection plan. I had been observing Bryan's 2nd period class during the World War II unit when Maya informed me that she would be starting her unit sooner than expected. With Bryan's permission I observed his 5th period history class when Maya's class conflicted. I did not have any problems making sense of the data because of regular communication with Bryan.

²⁵ Because of scheduling conflicts, I did not observe the 8th day of Bryan's unit when students wrote their Spanish American War essays independently during class.

one 30-minute period in Bryan's class and six 85-minute and one 50-minute period in Maya's class.²⁶ In Steve's case, I observed ten 45-minute class periods during his American Revolution unit and eleven 45-minute classes during his Westward expansion unit (see Table 2).

During these observations, I took field notes and audio-recorded the lesson (see Appendix A for observation protocol). When writing field notes, I attended to how the teacher introduced historical concepts and focused on aspects of historical thinking; how the teacher interacted with students and assessed student learning; the pedagogical methods chosen (e.g., lecture, discussion, small group work); and the resources or materials used. Following each observation, I listened to audio recordings to fill gaps in my notes and transcribed key data excerpts.

Table 2

Data Collection: Observations and Interviews

Teacher	Unit 1 topic	Number of lessons observed	Unit 2 topic	Number of lessons observed	Number of interviews
Steve	American Revolution	10 (450 minutes)	Westward expansion	11 (495 minutes)	4
Bryan	U.S. imperialism	7 (395 minutes)	World War II	15 (840 minutes)	4
Maya	U.S. imperialism	7 (595 minutes) ²⁷	World War II	7 (560 minutes)	4

²⁶ Inclement weather altered the length of some of Bryan and Maya's classes. Bryan's school also changed classes at the semester so the observation times reflected his new teaching schedule.

²⁷ Because of Maya and Bryan's conflicting schedules, I asked a colleague to audio record two of Maya's classes each unit. I transcribed each audio recording and gathered artifacts during those classes so that I had a more complete picture of the unit. I chose to observe all of Bryan's lessons because he integrated historical thinking more often into his classroom activities.

Interviews. In year one (2007-2008) of the larger teacher education study, I used semi-structured interviews (cf. Merriam, 1998) of university instructors and teacher candidates to learn more about the social studies methods course sequence and teachers' experiences in the program. I interviewed each methods instructor for approximately 90 minutes following the completion of their course(s) after the summer and spring semesters (see Appendix B for sample interview questions).²⁸ I interviewed each teacher candidate at the end of the fall and spring semesters for approximately 1 hour (see Appendix C for sample interview questions).²⁹

During data collection for this dissertation study (2008-2009), I interviewed each teacher before and after each set of unit observations (see Appendix D for sample interview questions). Interviews ranged from 1 to 3 hours depending on each teacher's availability and his/her willingness to reflect upon and share his/her experiences.³⁰ I personalized all interview protocols to obtain specific information from each teacher that was unique to his/her unit and socio-cultural context. These interviews provided insight into each teacher's decision making and the factors (e.g., school and district contexts) that influenced how he/she taught history. I audio recorded and transcribed all interviews.

Documents and classroom artifacts. The third primary mode of data collection involved collecting and analyzing documents and classroom artifacts. These sources included university methods course documents (e.g., syllabi, handouts), participating

²⁸ I personalized interview protocols for all participants including course instructors and my three case study teachers. The protocols in the appendix are examples and representative of similar interviews.

²⁹ I also used interview data collected after the summer semester by Dr. Chauncey Monte-Sano who conducted the larger study of these teachers.

³⁰ Steve's interviews averaged 90 minutes; Bryan's averaged 150 minutes; and Maya's averaged 60 minutes. I wanted to keep Bryan's interviews to 90 minutes, but he insisted that we continue talking and seemed to enjoy the opportunity to reflect on his teaching.

teachers' classroom handouts (e.g., readings, assignments and assessments), examples of teacher feedback on student writing, and district curriculum frameworks.

Pre-test/post-test. In addition to observation and interview data, I used data from a pre-test and post-test that we had administered to teachers prior to and following the completion of their teacher education program (see Appendix E for example questions). This qualitative instrument provided information about teachers' background, their disciplinary and pedagogical content knowledge, vision and goals for history education, and how they viewed the discipline. By giving teachers this assessment prior to and following their teacher education experience, I could gauge how their disciplinary understandings developed in the program.

Ranking task. During each post-unit interview, I had teachers complete a ranking task (see Appendix F) to assess the most significant influences on their instructional practices. Teachers had to rank on a scale from 1 to 5 the five most influential factors on their decision making during the unit. I provided a list of ten factors (including an "other" category) that aligned with the factors in my conceptual framework (e.g., disciplinary knowledge, vision, school context). After teachers completed the task, they explained to me how and why they ranked their chosen factors.

Limitations. Each method of data collection had its own methodological limitations; however, I incorporated a number of strategies to increase the validity and reliability of my case study research. To increase the reliability of the data, I documented all procedures and generated a trail of evidence between the research questions, the data collected, and the research conclusions (cf. Yin, 2003). I used both data and

methodological triangulation procedures (cf. Denzin, 1978) to enhance the validity of the study.

Perhaps one of the biggest limitations was my inability to select participants who had completed the same teacher education program route (integrated or 13-month) and taught the same course in their first year of full-time teaching. Of the ten teachers who completed the program in 2008, only four remained in the area to teach U.S. history. Ideally I wanted to include only those teachers who had completed the 13-month teacher education route, but this left me with only two possible participants. I also wanted teachers who taught the same U.S. history course (e.g., Revolutionary period through the Civil War or Reconstruction to the Present), but again this only left me with two possible participants. Ultimately, I chose to include two teachers who completed the 13-month program and added a third teacher who had completed the integrated route. Adding a third case enhanced the study's validity and provided more insight into variation in teaching practices. Logistical factors (e.g., scheduling conflicts, teachers' participation in another research study, and distance between school sites) prevented me from being able to follow all four U.S. history teachers who had graduated from the teacher education program in 2008.

Data Analysis

I engaged in a simultaneous process of data collection and data analysis (cf. Bogdan & Biklen, 1992; Miles & Huberman, 1994; Patton, 2002). Within 24 hours of each lesson observation, I listened to the audio recording to fill gaps in my field notes and completed a post-observation analysis form (see Appendix G). These post-observation forms allowed me to summarize each observation, make analytic comments, note

emerging themes and pose questions to guide future data collection. My qualitative data analysis consisted of three primary actions: data reduction, data display, and drawing conclusions (cf. Miles & Huberman, 1994). Through this process, my goal was to first understand each individual case prior to proceeding with cross-case analysis. Attention to each individual case ensured that patterns and themes were grounded in the specific case and its situated context (cf. Glaser & Strauss, 1967; Patton, 2002).

My first step to reduce the data involved coding, which helped organize and focus the data. My initial coding began with a provisional list of codes (see Appendix H), which I had developed from my research questions and conceptual framework. These descriptive codes focused on identifying historical thinking (e.g., sourcing, evidence-based thinking) in classroom activities and assessments (see Appendix I for an example of coded data). I followed this process with pattern coding (cf. Merriam, 1998) whereby I grouped initial codes into themes or constructs to further explain my data (see Appendix J). Throughout this coding process, I used Atlas.ti, a qualitative data software analysis program, which allowed me to easily track codes and emerging themes across data sources.

After multiple passes and coding of data, I wrote analytic memos to connect different parts of the data and develop conceptual ideas. I did this throughout data collection to help guide and focus my thinking. Memos ranged from a few sentences to multiple pages (see Appendix K for an example). I drafted interim case summaries to synthesize information about each case study teacher, and this served as a starting point for cross-case analysis.

Once I reduced the data, I used various displays and charts to organize my data. I created a calendar for each unit I had observed to track the content of each lesson, classroom activities, and the resources used. I created matrices to organize factors that influenced teachers' instructional decisions. These matrices included teachers' visions, disciplinary knowledge, and their department/school contexts and provided a visual display of how teachers' thinking and practices changed over time.

During the final stages of analysis, I verified and revised patterns with multiple passes through the data. I considered alternative explanations and used the data to further explain and verify each case. The cross-case analysis focuses on similarities and differences across the three participating teachers and helps explain how multiple factors influenced their decisions to varying degrees.

Chapter 4: Teaching History as an Interpretive Discipline—Steve’s Emphasis on

Historical Thinking

Steve entered his first year of teaching with an advanced understanding of the discipline and a desire to teach his students how to think historically. At the end of his teacher education program, Steve articulated a well-developed definition of history.

History is not synonymous with the past. To call history the past implies that it is stagnant and unchanging. Instead, history involves the study of the past and interpretive accounts of past events that are illuminated by careful examination of historical evidence...History is constructed, molded, crafted by careful analysis of the evidence at hand. (Post assessment, 05/13/08)

Steve acknowledged the importance of examining evidence to construct historical accounts, and he understood the difference between history and the past.

Steve used his developed understanding of history to plan and implement instruction. He wanted his students to engage in historical investigations to better understand the interpretive nature of the discipline. He articulated his desire to align his teaching practices with how historians practice historical study:

I think it’s important in the history classroom to encourage kids to think historically and to approach history the way people in the discipline do it. Albeit at a much smaller scale, but it’s important to get them to embrace how to make history, how to interpret. It’s not as simple as just reading facts out of a book. It’s much more involved. (Interview, 09/19/08)

Throughout the year, Steve emphasized historical interpretation in his classroom, and it became a core component of his teaching practices. Students read historical

accounts and learned how to use evidence to construct interpretations about the past. However, in conjunction with these innovative teaching methods, Steve also relied on more conventional teaching practices (e.g., lectures, textbook readings, worksheets, and multiple choice exams) to meet externally imposed coverage goals. The following chapter more closely examines how Steve taught his 8th grade students to read and think in U.S. history.

Overview of Instructional Units

During the two observed instructional units (American Revolution and Westward Expansion), Steve emphasized the constructed nature of history and various historical thinking and reading strategies while he also covered content in the county curriculum. The first unit on the Revolutionary period (see Appendix L for an outline of resources and activities) introduced students to historical analysis (e.g., sourcing, multiple perspectives, and assessing the reliability of accounts). Steve incorporated primary source documents in seven of the ten observed lessons and had students analyze historical events such as the Boston Massacre and Battle at Lexington Green. The three other lessons emphasized content and factual knowledge whereby Steve relied on more traditional pedagogy, such as lectures and worksheets.

After introducing historical thinking in the first unit, Steve built on these foundational skills during the year. In the second observed unit on Westward Expansion (see Appendix M for outline of resources and activities), Steve had students evaluate multiple perspectives and corroborate information across historical accounts. Students evaluated Jackson's presidency as a success or failure; they read and analyzed primary source documents about the Trail of Tears; and they considered the significance of

labeling historical events (e.g., Mexican-American War versus the U.S. Invasion of Mexico). Throughout both units, Steve frequently asked students to read historical evidence in order to *interpret* or *construct* history. Although he also infused lessons that were teacher-centered and delivered fixed knowledge to students, Steve's primary focus remained on integrating historical thinking into his instructional routine.

To complement Steve's instruction, which was grounded in disciplinary thinking, many of his assessments asked students to construct historical arguments. These written assignments allowed students to take a position in response to an open-ended question and craft an argument supported by historical evidence. Steve also incorporated assessments that mirrored his instruction that emphasized factual content. During both units, students completed traditional tasks, such as multiple choice exams and textbook worksheets that assessed their basic content knowledge.

Steve's Primary Goal: Teaching Students the Art of Historical Interpretation

Steve intended to use the first unit of the year on the American Revolution as an introduction to historical thinking and to seeing history as an interpretive discipline. In a pre-unit interview he articulated the importance of this first unit in providing a foundation for these ways of thinking in the discipline:

I want to emphasize the fact that history isn't set in stone and to encourage my students to understand and to participate and actually provide their own interpretations for history. And the phrase that's a good one to use is I'm trying to get them to be history-makers instead of history memorizers...This unit is an intro to historical analysis. And it's going to be the unit where we scaffold a lot of the different ways of thinking and approaching historical documents and different

historical sources, and we're going to try to build a foundation with this unit that we can build on further in the next few units. (Interview, 09/19/08)

In the county where Steve taught, the first unit in the 8th grade curriculum covered the Revolutionary period leading up to the creation of a new government with the Articles of Confederation. Beginning on the first day of the unit,³¹ Steve articulated the importance of interpretation to students and challenged their incoming conceptions of history. He started with a discussion and analysis of the Boston Massacre and wanted students to decide whether or not they thought the Boston Massacre was indeed a massacre. Students analyzed an engraving by Paul Revere and a drawing by Henry Pelham (a Loyalist), and they read excerpts from a sworn deposition by British Captain Thomas Preston and trial testimony of Bostonian Robert Goddard (see Appendix N for documents and assignment). After identifying the author of each document, his point of view, and evidence to support his view, students wrote a response to the following question:

Now that you have carefully examined four pieces of historical evidence surrounding the Boston Massacre, it is now time for you to provide your own interpretation to the question above. You will write a well-developed paragraph in which you state your position as to the focus question: "Was the Boston Massacre a 'massacre' or not?" (Field notes, 09/24/08)

³¹ The first day of the unit is the first day I observed in Steve's classroom. Although this came approximately 2 weeks after the first day of school, it was the first day of the unit dedicated to the Revolutionary period from Steve's perspective. He devoted the first two weeks to administrative issues (e.g., syllabus, pre-assessment) and to introducing students to the big unit ideas from the county curriculum. This included teaching background information leading up to the Revolutionary period (e.g., French and Indian War) and introducing students to the curriculum's emphasis on how to create change within and outside a political system.

This activity allowed students to judge the past using multiple sources of evidence. Steve did not simply tell students what happened at the Boston Massacre; rather, he gave students the opportunity to evaluate whether or not the Boston Massacre was indeed a “massacre.” The open-ended question allowed students to construct their own interpretations based on conflicting sources of evidence. Some students struggled with the novel idea of forming their own interpretations and wanted *the* answer from the teacher. After analyzing the two images, one student asked, “What really actually happened then? Why don’t you just tell us?” Steve encouraged the student to find his own answer, “It’s up for you to decide and interpret.” (Field notes, 09/23/08)

Steve continued to encourage his students to make interpretations throughout the unit. His class history was not comprised of right or wrong answers but rather arguments grounded in evidence. Steve told his students to “think like historians” and reminded them of the processes and strategies (e.g., sourcing) that historians use when they examine the past. While leading students in an inquiry lesson about Lexington Green, he said:

When we do things like this and we try to find out what happened at Lexington Green, we look at a lot of different historical sources to help us decide what happened. When we do this, I don’t want you to think that what we’re doing is impossible but remember history is full of interpretation. It’s your job to look at the evidence, make sense of it, determine the reliability of that evidence and make the best interpretation that you can like you did with the Boston Massacre. Many of you had different interpretations of whether it was a massacre or not. None of you really had anything that was factually incorrect of what happened at the

Boston Massacre, but you interpreted the evidence differently. You placed emphasis on certain pieces of evidence that other people didn't. You thought some pieces were more reliable than others. Same thing when people make sense of history; this is what they do. (Field notes, 10/03/08)

Steve reiterated to students that although their interpretations about the incident varied, it was okay because they were grounded in their analysis of evidence and its reliability. This lesson as well as others in the American Revolution unit provided students with a foundation for learning how to interpret history and argue about the past. Steve engaged students in processes that historians use and he made that explicit to students. He built on these ideas in the spring when reflecting on his goals for the Westward Expansion unit:

One of the things I wanted to do this unit was again to stress interpretation in history and how students can provide their own sort of voice in interpreting historical events, whether evaluating Jackson, providing a label for the war [with Mexico], or saying if Westward expansion was positive or negative. (Interview, 03/04/09)

Steve regularly incorporated activities that engaged students in historical analysis during the second observed unit. As he alluded to in the above excerpt, Steve had students evaluate the outcomes of expansion by introducing an essential question that remained open to interpretation: Did American expansion strengthen or weaken the nation? Steve explained how he used this central question in his teaching:

So those three types of expansion--geographic, political, economic--we're going to look at how those three types either strengthened or weakened the country so

it's up for interpretation and that's what I want them [students] to do at the end of the unit, to be able to answer that question. (Interview, 03/04/09)

After studying each topic in this unit, Steve had students construct interpretations based on evidence analyzed in class. For example, following the lessons on Andrew Jackson, a historically controversial leader, Steve instructed students to evaluate his presidency. In the pre- and post-unit interviews, he stated that he wanted students to “take a stand” and decide whether or not he was a successful president based on issues (e.g., the nullification crisis and Trail of Tears) they had studied in class. This focus on historical argumentation continued in the lessons on the Mexican-American War:

The whole idea of this was inquiry into the war itself and I wanted them to think about who was the aggressor here and decide on a label for the war. It just says “War with Mexico” as the title in the book and I wanted them to say if this should be changed. Should it be Mexican-American War or U.S. Invasion of Mexico?

Take a choice and back it up based on the evidence. (Interview, 04/01/09)

Throughout both units, Steve maintained his goal of wanting students to engage in critical analysis and construct interpretations based on their examination of historical texts. He infused opportunities for students to read and analyze primary and secondary sources and use them to craft arguments about the past. As students learned these disciplinary processes, Steve had to teach them a number of strategies for reading and analyzing historical documents.

Teaching Students How to Read Historical Texts

Key components of historical thinking are learning to read and evaluate historical sources. Students must learn to consider the source of an account and assess its reliability,

put the account into historical context, and make comparisons across multiple accounts and perspectives to more fully understand the historical topic. Steve began the year by giving explicit instruction in these history-specific reading strategies in conjunction with teaching students the process of historical interpretation.

An introduction to sourcing: is this art? Steve began the American Revolution unit with a brief activity that introduced students to the concept of sourcing. Steve projected a digital image of what appeared to be abstract art on the board and asked students, “Is this art?”³² After students discussed the image and defended their reasoning about the piece, Steve informed them that the image had been painted by a monkey. After this revelation, he asked students how it influenced their opinion about the piece, “You all have your opinions about this and whether or not it’s art when you just knew it was a painting. Now how do you feel? Who changed their opinion?” (Field notes, 09/23/08)

Steve explained his motivation behind the warm-up activity to his students. He wanted them to consider how knowledge of the author, or in this case the artist, influenced their views about the painting. He described to students how the activity connected to the process that historians engage in when they evaluate evidence from the past:

When historians sit down to try to figure out the past, they sift through evidence...to try to figure out what happened...When sifting through these different pieces of evidence to understand the past, they can’t just take everything at face value...One of the things they have to be careful about and consider is, who created the piece of evidence they are looking at? If it’s a document,

³² This activity had been modeled by the summer methods course instructor in Steve’s teacher education program.

something written, a letter or a diary, they have to think about who is behind the scenes writing this. If it's a painting, they have to think, who is the artist? If a photograph, who is the photographer? And they have to think about the beliefs, views, and biases...of these people and what they bring to whatever they created.

(Field notes, 09/23/08)

Steve used the monkey art activity to help students understand the importance of identifying the source of a document or artifact and using it to evaluate historical evidence. He then modeled the process of sourcing for students during the Boston Massacre inquiry. After analyzing an engraving and a drawing, he led students in the reading of a text by Captain Thomas Preston. While Steve read the document, which was projected onto the board, he annotated his thoughts in the margins so students could follow along:

STEVE: The first thing I look at. This is a sworn deposition by Captain Preston. March 12, 1770. And I know that Captain Preston is the officer in charge of the [British] troops in Boston at this time. He's quite possibly the man in Paul Revere's engraving standing behind the soldiers with his sword raised. Now we're getting his version of what happened. Now another thing that I notice which is important is this is a sworn deposition. What does that sound like? What do you think this is?

GRANT: Under oath.

STEVE: Yes, absolutely. He is under oath. So I can make an assumption possibly, and we'll see if that changes, that maybe he is telling the truth because he is under oath. (Field notes, 09/24/08)

Steve highlighted the importance of identifying the author (in this case, Captain Preston) and the type of document (sworn deposition) when reading a historical text. He instructed students to record this information for each source in the inquiry lesson on a document chart (see Appendix N for the graphic organizer).

Teaching students to evaluate the reliability of historical accounts. During this introductory unit, Steve stressed the importance of using source information (i.e. the author, type of document, and when it was written) to evaluate a document's historical reliability. Following the Boston Massacre activity, Steve engaged students in an inquiry lesson on Lexington Green (see Appendix O for documents and assignment),³³ and he had them rank in order the reliability of five potential sources of information: an eyewitness Patriot, an eyewitness Loyalist, an eyewitness British officer, a British newspaper, and an American historian 200 years later. Steve gave the following instructions to students:

I want you to imagine that you are a historian. Your job is to answer the question, what happened at Lexington Green? And you are looking at a bunch of different sources of evidence to come up with conclusions. You have eyewitness accounts from Patriots. You have eyewitness accounts from Loyalists. You have eyewitness accounts from British officers and people involved in the skirmish. You have in your possession a British newspaper that wrote about what happened at Lexington. You also have an account from a historian today who is writing about what happened [and] doing the same thing you are trying to do. I want you to think about it right now and try to rank in your head how you would rank these

³³ This inquiry question and the document set were first created for teachers in the 1970's as part of the Amherst History Project. They were then edited and used by Wineburg (1991) in his research, and Carrolton County then incorporated these texts into their 8th grade history curriculum.

in terms of the most reliable account of Lexington Green and then least reliable.

What information would you trust? From which source would you trust most?

Think about the reasons why you feel they are reliable or not reliable. (Field notes, 10/01/08)

Steve began the lesson by trying to engage students as novice historians to answer the inquiry question, what happened at Lexington Green? This central investigative question connected his classroom activity with how the discipline is practiced professionally. Steve also emphasized essential thinking skills by having students judge the reliability or trustworthiness of multiple sources of evidence. He hinted at the difference between accounts that are firsthand versus those that are secondary and the importance of determining when they were written. The following is an excerpt from the class discussion that followed:

STEVE: What did you put first as most reliable source?

ERIC: A Loyalist.

STEVE: Why so? Give me a reason.

ERIC: Because I limited it down to the eye witnesses because they were direct sources. They actually saw it happen. The British officer would be extremely against what the Patriot would think and the Patriot would be extremely against what the British offer would think. The Loyalist would still be against what the Patriot would think but not necessarily the officer.

STEVE: Okay. So you have the 2nd and 3rd ones too so which ones do you have after the Loyalist? You said the Patriot?

ERIC: The Patriot.

STEVE: And then the British officer. So he brings up a good point. So Eric put all the eyewitness accounts up 1, 2, 3 because they were actually there. They saw what happened, but he recognized that each of these people is going to have their own biases. Now he trusts the opinion of a Loyalist more than a Patriot or a British officer based on how he thinks about what their biases might be and what kind of information they might be giving in their accounts.

AKSHAY: A Loyalist would have every reason to lie.

ERIC: So would a Patriot.

AKSHAY: I know but a British officer wouldn't have as much reason to lie as a Loyalist.

STEVE: So you are putting them there like that [1- British officer, 2- Loyalist, 3- Patriot]? Okay, that's an interesting perspective. Maybe the British officer has less of an incentive to exaggerate or tell a different story. (Field notes, 10/01/08)

In the above discussion, students defended their reasoning in how they ranked their evidence as more or less reliable. Eric and Akshay recognized the importance of eye witness accounts and ranked them as the most reliable. They differed in how they ranked the reliability of the documents based on their perceptions of the author's intentions, but this reflected Steve's goal of getting students to come up with their own arguments supported by sound reasoning. After discussing the eye witness accounts, Steve then asked students about the two other sources of information: the newspaper and the historian's account:

STEVE: So far we've been talking about eye witness accounts. Where are we going to put these [historian and newspaper]? ...

JOE: I think the American historian would go in #4.

STEVE: Why?

JOE: Because he has everyone's documents. He has the British newspaper, the Loyalist, the eye witness. And actually that could maybe make them #1 if they have everybody and base it off all the information. The Loyalist has a reason to lie. He doesn't have a reason to lie about anything.

STUDENTS: That's what I had.

STEVE: So perhaps because the American historian you are going to assume is a responsible historian. He's taking in all the evidence that he possibly can gather and he has sorted through all these different eye witness accounts and these different newspaper accounts and he has come up with his best conclusion that he possibly can and that he could be considered most reliable. (Field notes, 10/01/08)

In the above excerpt, Joe understood the importance of corroborating across multiple accounts when forming an interpretation about the past. Steve recognized the significance of the student's thinking and reiterated its importance to the rest of the class. He then challenged students to consider the date of the historian's account and how that influenced their assessment of its reliability:

STEVE: Now what about the date? Did that come into play at all? Two hundred years later. So think about present day. Present day historian writing about Lexington Green. Does that make any difference in your judgment here? ...

JUSTIN: I put it as #1, American historian because back then every one of those people were biased and had their own opinions about what was going on but someone from today just looks back at it and thinks with an even perspective to

everyone so they wouldn't really say, like they wouldn't side with the Patriot or British officer or side with one side.

STEVE: Okay. So here's a question for you. Do you think there would be any difference from an American historian and British historian from today? Or any other historian that may have different biases, different views? Maybe you look at the same evidence but you interpret it differently so you come to a different conclusion. (Field notes, 10/01/08)

Steve's assessment of Justin's thinking led him to pose additional questions to challenge students' views of bias in historical accounts. Any account, regardless of when it was written, has inherent biases based on the viewpoints of the author. Steve wanted students to understand that an account written by an American historian may differ from that of a British historian and thus affect how students rated their reliability. He continued to push their thinking when discussing the reliability of the British newspaper account as most students ranked it near the bottom as one of the least reliable:

ERIC: The British newspaper and American historian aren't that reliable because [they are] getting some information from eyewitnesses who are already biased.

STEVE: Eric brings up a good point. The historian and the newspaper because they weren't there to witness the event, they are writing 200 years later. Well the British newspaper, [we] don't know the date but let's assume pretty much it's the same time as when this happened. They are relying on these eyewitness accounts so if these eyewitness accounts are biased, then how do we know conclusions they are coming to are sound? (Field notes, 10/01/08).

Steve encouraged students to think more critically about reliability and bias. If all accounts have some degree of bias, then how do historians compare their reliability? Steve wanted students to start thinking about these questions because eventually he would have them construct their own interpretations and need students to support their reasoning:

I wanted you to think about how you judge these accounts as being reliable or less reliable because as you sift through the evidence you have to think about that because when you are trying to come to your own conclusions, you need to make sure they are based on reliable evidence. These are all types of accounts we're going to look at to try to piece together what happened at Lexington Green so think about your own opinion about the reliability of these different accounts.

(Field notes, 10/01/08)

Throughout this class discussion, Steve engaged students in historical thinking by having them use source information to assess the reliability of multiple accounts. Students examined the author and context of each account in relation to when the battle occurred at Lexington Green. This attention to sourcing and context provided a foundation of historical reading strategies, which students used throughout the year. By the second semester, students had to synthesize information across multiple accounts (i.e. to corroborate documents) to form their own interpretations.

Teaching Evidence-Based Thinking

Writing evidence-based arguments is central to understanding history as a constructed discipline. During inquiry-oriented instructional activities, Steve engaged students in writing historical arguments and using evidence from multiple primary and/or

secondary accounts to support their positions. He wanted students to take a stance and argue a position rather than remain neutral. He told students it was their job as historians to “sift through evidence and argue a side” (Field notes, 10/28/08). He explained this goal in one of his pre-unit interviews:

I hope that they [the written assessments] help me see not only did they [students] have a strong grasp of the content but can they back up their own interpretations using evidence... Sometimes they just want to say yes or no answers and I’m trying to emphasize you need to give a reason and be able to support it. (03/04/09)

Students had their first experience writing an evidence-based argument after the Boston Massacre lesson when they had to argue whether or not the incident was a “massacre.” During the inquiry activity, students had to identify evidence that supported the author’s position in each document. Steve had students organize their evidence in a document chart (see Appendix N), and they used this to write their paragraphs. He gave students a list of criteria (see Appendix N) that asked them to use evidence from two of the four sources they had analyzed and to provide an explanation for why their chosen evidence was the most convincing or reliable in their paragraphs. This initial writing activity allowed Steve to see how students used evidence to support an interpretation. He explained:

What I was really looking for when I was assessing was specifically how were they [students] able to use evidence, if they did first of all, and were they able to use it effectively? In that way it was almost a pre-assessment for seeing how they can write in history, how they can use evidence because it’s something we’ve

never done in class and they may or may not have been introduced to it.

(Interview, 10/28/08)

After this introductory unit, Steve continued to engage students in activities that fostered historical thinking. By the Westward Expansion unit, he expected students to employ multiple historical thinking strategies, such as sourcing and evidence-based thinking, when writing an argument. During this unit, Steve had students complete an investigation about the War with Mexico and argue whether the textbook company should change the name to the Mexican-American War or the U.S. Invasion of Mexico.³⁴ These are the instructions Steve gave to students prior to beginning the inquiry activity (see Appendix P for complete set of documents and assignment):

First thing you need to do is take a look at the title, the source info at the top of the page for your document. Then you are going to read the background which will help you understand it better...Then you need to read it aloud and follow along with the group. Once you've read the document, your next step is at the bottom of the page. There is a discussion question and it will give you clues about what to hone in on in the document. Don't skip it over...Then once you have talked about the discussion question on your chart, you are going to find whatever document you are, A through F. First column, give me source info, author, time, date, type of document it is. Next column based on this document, and this document alone, what would be the title of the war? Next column explain it, choice of one of two labels [Mexican-American War or U.S. Invasion of Mexico].

³⁴ The 8th grade textbook used the label "The War with Mexico" to describe the war between the United States and Mexico from 1846 to 1848. Steve explained that the textbook company chose a neutral title, and he wanted the students to re-label the war as the Mexican-American War or the U.S. Invasion of Mexico after reading multiple sources of evidence.

Tell me why this document supports that label. Then you give a quote at the bottom from the document that supports choices. You will need to use quotes when you write a defense of the title you choose for me and you need quotes from the documents...Last column I want you to think about, think about the reliability... Think about what are the pros and cons of using this type of source. Think about the author and type of document, primary or secondary. (Field notes, 03/09/09)

During this activity, students were to analyze source information on all documents, assess their reliability, identify the viewpoints of the authors and keep track of evidence in support of those viewpoints. The activity culminated with a writing assignment in which students wrote a letter to the textbook company arguing their chosen label for the war (see Table 3 for assignment). Students had to evaluate the evidence given to them, assess its reliability and corroborate across multiple sources of information to form a well-reasoned argument. Steve emphasized the importance of citing specific source information when students used evidence in their writing: "When you are citing the documents, don't put according to document A, according to document B. You can say according to President Polk's speech to Congress...give me the date when you cite quotes" (Field notes, 03/12/09). Steve wanted students to trace their evidence back to its original source to remind them of the context, author and underlying purpose of the document.

Table 3

War with Mexico Inquiry Activity

War with Mexico: Mexican-American War or US Invasion of Mexico? Letter to Textbook Editor	
Instructions	<p>“Mexican-American War” or “US Invasion of Mexico”? Which label should live on in the history books?</p> <p>You have been asked by the Houghton Mifflin Company to serve as a guest editor of <i>Creating America</i>. You have conducted extensive research into the question above by examining a wealth of historical accounts pertaining to the war with Mexico. Now it is time to convince the Houghton Mifflin Company, who produces the textbook, to change the title for Chapter 13 Section 3 to one of the labels above. Your task is to write a letter to the textbook company convincing them that the label you chose is the proper one for this section. It will not be an easy sell—you will have to use <u>direct evidence</u> from the documents you analyzed during your research to support your argument.</p> <p>Your letter to the textbook company should contain the following parts:</p> <ul style="list-style-type: none"> • An introductory paragraph in which you state which label you believe is proper for the war and briefly explain your reasoning for choosing that label • Additional paragraphs in which you use direct evidence from three documents to support your choice. You must adequately explain how the documents you cite support your choice of a label for the war. • A conclusion paragraph that reinforces your argument. • Proper business letter format so Houghton Mifflin takes you seriously.

Teaching Historical Thinking: Areas for Future Development

As a first year teacher, Steve exhibited a number of strengths in how he approached history instruction. He presented history as an interpretive discipline and regularly engaged students in inquiry activities that required them to analyze evidence and construct arguments about the past. In addition to these strengths, Steve exhibited two areas for future growth: 1) his ability to consistently teach historical thinking within a

context that prioritized content coverage, and 2) his ability to scaffold students' historical thinking.

Working within constraints: Steve's efforts to balance historical thinking and content coverage. Steve's primary goal was to teach students to think historically, and he often led them in inquiry activities as a means to reach that goal. However, when he wanted to cover more content, Steve relied on instruction that presented history as fixed knowledge. While the inquiry-oriented lessons were student-centered and asked students to read and analyze primary and secondary sources, the days that focused on content coverage tended to be more teacher-centered as Steve provided specific facts or knowledge to students.

During the first unit, Steve devoted three of the ten observed lessons to covering content (see Appendix L for unit outline). The content-heavy days typically included lectures and notes. For example, on day four of the unit, Steve chose to teach the Proclamation of 1763, the Stamp Act, the Townshend Acts, the Tea Act, the Boston Tea Party, and the Intolerable Acts. Students took notes on the first four British acts, and then Steve gave a mini lecture on the Intolerable Acts before students started on their homework—an assigned textbook reading and a worksheet that required students to recall basic information. Similarly, on day eight, Steve taught the First Continental Congress and the Battle at Breed's (Bunker) Hill by using a brief video clip and a longer lecture. On these days, history was no longer about interpretation but rather rote information that students needed to memorize. Students assumed the role of passive learners while Steve selected a more didactic instructional approach.

The second unit assumed a similar pattern: six days emphasized historical inquiry and the interpretive nature of history while five focused on fixed historical knowledge (see Appendix M). However, one major difference appeared in this unit; Steve infused multiple primary source documents in his lessons that emphasized content coverage. He used the documents and excerpts as another means of providing knowledge to students. For example, when Steve lectured about President Andrew Jackson and the national bank, he included excerpts from Jackson's Congressional address and 1832 newspapers. Although Steve used these primary source documents within the context of a lecture, they provided students with multiple perspectives on the banking issue. Similarly, during a lecture/discussion about the Texas Revolution, Steve emphasized the context and asked students questions that required them to empathize with people from the past:

Now just to be clear when we talk about Texas today, we are talking about the period between 1830 and 1840...We're not talking about Texas as a state of the United States. We're talking about Texas as a territory of Mexico. All of this land was Mexican territory, part of Mexico at this time so when we say Texas, we're talking about part of Mexico....If you were an American living in Texas, who would you be more loyal to, the United States or the Mexican government? Why?

Even though engaging students in historical analysis was not the primary goal of these lessons, Steve integrated historical ways of thinking into his lectures and whole class discussions.

Steve's partial emphasis on content knowledge reflected his 8th grade team's learning objectives and assessments. Even though he made historical thinking an important part of his teaching practice, he aspired to meet other expectations set for him.

The other 8th grade history teachers provided Steve with daily learning objectives, which he used to guide his planning. As a group, they assigned regular textbook readings and worksheets and administered chapter tests comprised of multiple choice and matching questions.³⁵ Steve's colleagues gave him a template for each exam, and he made minor modifications before administering it to students.

Table 4 displays example test questions created by the other team teachers and some added by Steve. While the team-created questions emphasized basic facts, Steve added some questions that incorporated documents or topics they had studied in-depth in class. For example, Steve's second question below includes a quote from one of the documents students had read in their inquiry lesson on the Trail of Tears. These questions required a higher level of thinking from students than the questions presented on the team test, but they did not assess students' historical thinking.

³⁵ The 8th grade team at Steve's school organized their instruction and assessments around textbook chapters rather than the county curriculum (which were both quite different from one another). Steve used county resources and tried to incorporate those themes into his teaching since students had to take a countywide standardized final exam.

Table 4

Example Team Exam Questions and Test Questions Added by Steve (Units 1 and 2)

Test Questions Prepared by other 8 th Grade History Teachers	Test Questions added by Steve
<p>Unit 1: Which of the Acts gave Parliament the supreme control to govern the colonies?</p> <ul style="list-style-type: none"> A. Townshend Act B. The Declaratory Act C. The Quartering Act D. The Stamp Act 	<p>Question about causation: Why did some colonists protest Parliament's taxation of the colonies?</p> <ul style="list-style-type: none"> A. Colonists protested that all taxes were unfair and hurt their economy. B. Colonists wanted to pass more tax laws, but did not have the representatives in Parliament to speak up for their interests. C. Colonists wanted adequate representation in Parliament and did not think taxes passed against them without their input were fair. D. Colonial governors passed taxes and laws without the input of their elected legislatures.
<p>Example matching question (unit 2): What was the name for the journey made by the Cherokee after they were removed from their lands by force?</p> <ul style="list-style-type: none"> A. Whigs B. Jacksonian Democracy C. Indian Removal Act D. John Quincy Adams E. Trails of Tears AA. Nullification BB. Election of 1824 CC. Election of 1828 DD. Election of 1840 EE. tariff AB. John C. Calhoun AC. Henry Clay AD. secede AE. inflation BC. Nicholas Biddle BD. spoils system BE. Sequoia CD. Andrew Jackson 	<p>Question linked to Steve's Trail of Tears Inquiry: After the Supreme Court rules in favor of the Cherokees, Jackson said, "John Marshall has made his decision....Now let him enforce it." What did he mean?</p> <ul style="list-style-type: none"> A. that it was up to the Supreme Court to enforce its decisions B. that Jackson was upset that Marshall had made the Court's decision C. that it was not the president's job to enforce the rulings of the court D. that Jackson did not intend to carry out the Court's ruling

The summative assessments designed by team teachers relied on the textbook as the sole source of information. These traditional textbook chapter exams included multiple choice and matching questions that did not allow students to think historically. Steve used these assessments throughout his units in conjunction with team-created homework assignments (e.g., fill-in-the-blank worksheets) and quizzes. These recall-oriented assignments did not align with Steve's instructional goals of teaching historical thinking and provided little information about how students understood the discipline. Although these practices did not dominate his instruction, they played a significant role in how he planned and implemented his units.

The juxtaposition of inquiry-oriented activities with more traditional didactic instruction sent contradictory messages to students. Was history about analyzing evidence, constructing arguments about the past, and making historical interpretations? Or was history about knowing the right answers for an exam? Arguably students need knowledge of the larger historical context to participate in inquiry activities; however, Steve chose to rely on lectures as the primary means to communicate content knowledge rather than incorporate activities, such as independent research or collaborative group work, that promote student-centered learning. Even though Steve made historical thinking central to his instruction, the stark contrast in some of his lessons affected how he represented history to his students.

Developing strategies to scaffold students' historical thinking. A second important area for future growth was Steve's ability to scaffold students' historical thinking. He showed signs of improvement throughout the year, but he often struggled to guide students in their learning as they read and analyzed historical documents. For

example, during the first unit Steve engaged students in an inquiry lesson on Lexington Green. After a discussion about source reliability, students worked in groups to read one of eight sources, completed a document chart, and then presented their information to the rest of the class. Steve did not explicitly guide students in reading their assigned documents, and when left to read independently, many students started with the chart and tried to find the answers in the document rather than read the text from start to finish. When Steve had his students share their information with the class, some groups had misinterpreted their assigned text. Here is an excerpt from one group's presentation (see Source 6 in Appendix O):

STEVE: So this is a personal narrative from the youngest British officer at Lexington. So how many people were there?

GRANT: Five companies.

STEVE: Five companies of?

GRANT: British.

STEVE: And how many patriots?

GRANT: It didn't say.

STEVE: I think it did.

GRANT: It did?

STEVE: Yeah. One company of Patriots. So we have numbers skewed here. Five companies of British and only one company of Patriots...Why were they there?

GRANT: Because they were delivering boxes of things.

STEVE: Um...are you talking about "order to load"?

GRANT: No, it says “It was at Lexington when we saw one of their companies drawn up in regular order.”

STEVE: Oh, that means they were in line, military formation. So we know they were in military formation but we don’t know why they were there...What happened after they fired?

GRANT: British hid behind a wall.

STEVE: Not the British.

GRANT: The Patriots. (Field notes, 10/02/08)

While reviewing the main ideas of the text, it was evident that Grant’s group had misinterpreted the meaning of the document. Steve had opted to use the county-provided resources for this Lexington Green inquiry activity, but he did not model how to read or analyze the texts nor did he add questions to guide students’ reading. While groups read their assigned document, Steve did not circulate around to check students’ understanding. In the end, he decided to eliminate the final activity that asked students to write in response to the inquiry question (What happened at Lexington Green?) because he thought students had a limited understanding of the complete set of documents. He reflected:

It’s hard when one group is looking at one source and then they have to listen to others present about the other sources and they don’t get a full understanding of what information is in the other sources so it’s hard for them. And this is part of the reason why I didn’t have them write the assignment at the end. It’s hard for them to judge the reliability and make a decision about what happened at Lexington Green when they only have scanty knowledge of what’s in the other

sources...I definitely think there is a problem there with students seeing the whole picture. (Interview, 10/28/08)

During the second observed unit, it was evident that Steve had modified his instructional methods to better scaffold students' historical thinking. For example, in the War with Mexico inquiry, students read the complete set of historical documents rather than only one of the assigned sources. Steve exposed his students to multiple perspectives and tried to improve their understanding of the context. He facilitated students' understanding of the texts by regularly rotating among groups and asking questions to focus their thinking (a practice he did not implement in the first unit). For each document Steve asked students to answer a discussion question, which was intended to focus their attention to a particular aspect of document. When students wrote their letters to the textbook editor, Steve provided them with a pre-writing graphic organizer, a model business letter, and a rubric so students knew how they would be assessed.

Steve made noticeable improvements in how he scaffolded students' reading and analysis. However, he did not explicitly model reading and writing strategies (e.g., how to craft a thesis statement or use and explain evidence) for students. Steve attributed his students' weaknesses in their arguments to his failure to adequately scaffold their thinking. He reflected in a post-unit interview:

I wanted them to, for each source, to support one of these two labels and then explain why. Give a quote and think about the reliability. A lot of them and this is something I maybe could have clarified or maybe it just shows a lack of my sort of scaffoldness type of thinking, but they had trouble reading in between the lines and thinking about what the documents are doing and what the people writing

them are doing.... It probably would have been better to have a whole class discussion of these to some extent because there are some really abstract ideas I guess in some of these that I wanted them to see....It was very ambitious and probably wasn't structured enough for what I was trying to do.

(Interview, 04/01/09)

Although Steve struggled in some ways to fully guide students in their analysis and show them how to corroborate across sources to form their arguments, he recognized this as an area for future growth.

Teaching Historical Thinking: A Summary of Steve's Practices

Steve began his first year of teaching with a strong understanding of the discipline. His primary goal was to bridge the gap between the classroom and the discipline by teaching his students the art of historical interpretation. Beginning with the first unit of the year, he introduced his 8th graders to historical thinking strategies, such as sourcing and evidence-based thinking, and engaged them in related inquiry-oriented activities. He led students in whole class discussions in which they learned how to read evidence and assess its reliability. His students frequently read primary and secondary accounts and used them to construct arguments about the past.

Throughout the year Steve grew in his ability to make historical thinking strategies more accessible to his students. Although at times he struggled to scaffold student learning, he recognized this as a skill that he was continuously developing. In the first unit, he relied on more direct instruction, and students primarily worked individually during class activities. By the Westward expansion unit, Steve gave students more

opportunities to work collaboratively and provided them with additional written scaffolds (e.g., charts, outlines, and templates) to guide their thinking and writing.

During each unit Steve balanced his discipline-specific practices with more traditional teaching techniques and resources. This pedagogy aligned with team-provided summative assessments that emphasized content over thinking. These instructional activities emphasized basic factual knowledge and thus did not provide insight into students' disciplinary thinking. This dichotomy of teaching methods at times presented mixed messages to students about the nature of history and is something Steve should address as he gains more experience.

Overall, Steve made historical thinking central to his pedagogy, and he made an effort to bridge his classroom activities with those practiced by historians. He provided students with abundant opportunities to think historically and taught them about the interpretive nature of the discipline. He invited students to inquire about the past and to construct their own historical interpretations. How then was Steve able to begin to bridge the gap between school history and the discipline? What influenced his decision to teach historical thinking? Chapter 7 discusses Steve's decision making in further detail and examines how various factors influenced his pedagogy.

Chapter 5: “A Tale of Two Units”—Bryan’s Dual Focus on Historical Thinking and Comprehension of Fixed Historical Content

After working in the business sector for many years, Bryan decided to make a career switch and become an educator. With a double major in government and communications, Bryan entered the teacher education program with limited experience in disciplinary history. However, he developed his understandings throughout the year and by the end of the program, Bryan recognized the importance of perspective and context in understanding historical events. He stated:

We know that history is the weaving of events, people and circumstances that reveal the actions of a time and the effects of those actions on future events. But the perspectives of those events are told in varying ways, through the selection of sources that we use to help give insight, perspective, and context to the actions that are recorded of people and how they impact the lives, actions and events in the future. (Post assessment, 05/13/08)

In this definition, he attended to the complexity of historical study and the importance of using multiple sources to understand the past through various perspectives.

Bryan used this developing disciplinary knowledge as a framework for planning instruction. Upon starting his first year of full-time teaching, he articulated multiple goals for his students:

I’m trying to get them focused on two things. One being able to pull evidence out of material, whether that’s primary sources or other readings and then also to write about that...And then everything else just kind of aligns with that. Trying to teach them better reading comprehension. Trying to get them focused to improve

their reading skills but also understanding the content so that they can be successful on a test or a county exam or whatever it is that comes up.

(Interview, 11/03/08)

While Bryan's primary goal for students focused on identifying and using evidence in their writing, he also wanted students to be successful on county assessments. This meant improving students' literacy skills and aiding their comprehension of basic historical content. This dual focus on teaching evidence-based thinking and teaching a fixed story of U.S. history characterized Bryan's instructional approach in the classroom. He regularly engaged students in careful analysis of historical texts and had them incorporate evidence in their writing, but he often used these texts to cover specific content and ideas in the curriculum rather than encourage his students to construct their own interpretations about the past. Throughout the year, Bryan struggled to find a balance between prioritizing his own goals for student learning and meeting external coverage demands.

Overview of Instructional Units

To get a clear sense of how Bryan taught history, I observed two units of instruction: imperialism and World War II. The unit on imperialism lasted for eight class meetings while the World War II unit lasted for fifteen (see Appendix Q and Appendix R for outlines of the two units).³⁶ The first unit included one lesson concerning United States foreign policy objectives, one lesson regarding beliefs about U.S. imperialism in

³⁶ Bryan's school had students switch classes after the first semester so I chose to observe one unit each semester in two different classes. For the first unit, his class met three days per week for 45 minutes and two days for 60 minutes. During the second unit, his class met three days per week for 45 minutes and one day for 90 minutes. It is important to note that I observed the imperialism and Spanish American War lessons from his first unit to make comparisons with Maya, but I did not observe his lessons on WWI since this content was not part of Maya's unit. Because I thought I missed the whole picture by not seeing Bryan's complete unit as laid out by the county, I decided to observe his entire World War II unit.

the late 19th century, and a six-day inquiry lesson that focused more in-depth on an example of U.S. imperialism during the Spanish American War. Bryan used county curriculum materials for the first two days of the unit and emphasized specific concepts that would later be assessed on the county unit exam. In comparison, Bryan used an online resource, *Historical Thinking Matters*,³⁷ for the subsequent lessons on the U.S. invasion of Cuba, and this provided students with an opportunity to examine this historical event in detail. The inquiry lesson, which was guided by the question “what led the U.S. to invade Cuba?” introduced students to historical ways of thinking, specifically sourcing, contextualization, evidence-based thinking and historical interpretation. Students read and analyzed primary and secondary sources and used them to respond to the inquiry question. Bryan opted to use the modified version of the documents from the online resource to aid students’ comprehension of the texts.³⁸

The World War II unit assumed a slightly different pattern as Bryan used historical documents to cover topics in a content-heavy unit. He used a central question—how does the common good change in times of crisis?—to link lessons throughout the unit and to convey a particular story to students. Bryan explained:

We have isolationism. We’re looking at this crisis that is emerging in Europe.

We’re looking at Pearl Harbor. Then going through the unit we’re looking at the war strategies. How does this change what we determine is the common good? ...

And if you notice in a lot of the questions that I asked in the essays were related to

³⁷ A professor in Bryan’s teacher education program introduced the online resource, *Historical Thinking Matters*, during the fall methods course. This resource provided an in-depth inquiry lesson on the U.S. invasion of Cuba. For details see <http://historicalthinkingmatters.org/>.

³⁸ *Historical Thinking Matters* provides teachers with multiple versions of the same set of primary source documents. This includes a more scaffolded version of texts to aid student comprehension as well as a Spanish version.

that. You know, how does Roosevelt's speech on sacrifice impact the common good in this time of crisis? This idea of isolationism to involvement—how is that going to impact Americans during this time of crisis? ...When we look at the outcomes of the war, the Truman Doctrine, we're now going to defend democracies all around the world...We've got a much larger international role than we've ever had so the common good has expanded to encompass those people that weren't a part of our common good before that we didn't really care about because we were isolationists. (Interview, 03/24/09)

Unlike the imperialism unit, Bryan did not engage students in an in-depth inquiry lesson, but he did have students read multiple primary and secondary sources to learn about the major themes of the unit. Bryan devoted much of his time to researching appropriate texts, which he modified and used in his daily lessons. Although Bryan emphasized the importance of using quotations in student writing, the extent to which he had students use evidence to construct their own historical interpretations was somewhat limited. Throughout the World War II unit, he used historical texts to convey a particular story to students and to cover specific content outlined by the county. Students used these texts as evidence of that story rather than using them to construct their own arguments about the past.

Bryan's assessments aligned with this dual focus on evidence-based thinking and content coverage. His school standardized end of unit assessments and they assumed a traditional multiple choice and short answer format.³⁹ Although Bryan felt he had to

³⁹ The county's grading policy defined student grades as consisting of 40% formative assessments, 10% homework, and 50% summative. Bryan's school defined "summative" as end of unit assessments that were standardized across classrooms. This included county exams and supplementary activities assigned by the social studies department. Teachers could not design their own end of unit assessments.

prepare students for county assessments (e.g., by giving students multiple choice warm-up questions to start class), he also emphasized writing and discussion. At the end of the Spanish American War inquiry lesson, he had students write in response to the central question—what led the U.S. to invade Cuba? As a culminating activity for the World War II unit, Bryan led students in a Socratic seminar⁴⁰ in which they discussed the central unit question. Data from both of Bryan’s units provide insight into how he taught students to think historically (e.g., to use evidence in their writing) while also trying to meet the county’s content-driven curriculum objectives.

Teaching Students to Read and Analyze Evidence: A Spanish American War Inquiry

Bryan’s central goal for student learning involved getting them to identify evidence in texts and then use evidence in their writing. He shared, “Part of my year long [goal] is really this idea of incorporating evidence to support your statement...How do I use that information to better state my case using evidence from materials that I’ve been given?” (Interview, 03/24/09) During the first unit, evidence-based thinking played an integral role in his classroom as students learned to analyze evidence in primary source documents and incorporate evidence in their writing to support an argument.

Bryan introduced students to the importance of evidence during his inquiry lesson on the U.S. invasion of Cuba and the Spanish American War. To begin the lesson sequence, Bryan presented the central inquiry question—why did the U.S. invade Cuba? Students viewed a video clip from the *Historical Thinking Matters* website and read a

⁴⁰ During the Socratic seminar, the teacher used a central question to engage students in a conversation about a particular text and assessed their understanding via discussion. In this case, Bryan had students discuss the unit essential question: How does the common good change in times of crisis? He had multiple sub-questions to guide students during the seminar.

textbook excerpt about the Spanish American War (see Appendix S) to look for evidence that would help them answer the inquiry question. Bryan then distributed a packet of nine primary source documents (see Appendix S), and the class read the first one, an excerpt from the *New York Journal*, together. Bryan instructed students to highlight excerpts in the document as they read:

BRYAN: Use your highlighter or pen to underline some things especially when it comes to evidence because now we're going to look at two other things on your graphic organizer. We're looking at causes and evidence to support that [reasons why the U.S. invaded Cuba]. So what is evidence?

MARIE: Details.

BRYAN: Okay, details that are conclusive. Something like a quote that's included in there.

PAUL: Proof.

BRYAN: Proof, yeah.

JUAN: Quote.

BRYAN: Yeah. Quote. Something that helps to support what it is you are saying is a cause. Something that led the U.S. to invade Cuba. That's what we're looking for when we read through this document. (Field notes, 11/13/08)

After reading each paragraph in the document, Bryan referred students back to the text to identify evidence that could be used to answer the inquiry question.

BRYAN: What evidence do we see in this paragraph?

EMILIO: It says, “Wires connected the mine to the magazine of the ship.” It says, “If this is true, the brutal nature of the Spaniards will be shown by the fact that they waited to explode the mine until all the men had gone to sleep.”

BRYAN: Good connection there to a piece of evidence that’s going to lead us to why the U.S. invaded Cuba.

Student reads another paragraph.

BRYAN: Any evidence in this paragraph?

LATICIA: “The destruction of the Maine in Havana Harbor wasn’t an accident.”

BRYAN: Okay interesting. What else?

GABE: Nothing to argue that it wasn’t an accident.

BRYAN: Okay, good. “Not a single fact to contrary has been produced.”

Anything else? Maybe one more.

PAUL: “Suspicion that the Maine was purposely blown up grows stronger every hour.” (Field notes, 11/13/08)

After reading the first document together to identify possible causes for the U.S. invasion, students split into teams to read two of the remaining eight documents. After reading each text, students completed a document chart, in which they identified the source of the document, causes for the invasion, and evidence to support those causes. Students completed individual charts and also created a group chart on poster paper to display on the wall so that other students could see what they had identified (see Table 5 for an example). Bryan used this “jigsaw” method frequently whereby students read single documents (rather than the complete set) in groups and then shared information from their assigned text with the rest of the class. While students worked in their teams,

Bryan regularly rotated among groups to guide their thinking. The following is an excerpt from Bryan's conversation with one of the groups who had read an excerpt from Albert Beveridge's Senate campaign speech:

BRYAN: Why is this speech important? Why are they including it in here in talking about the invasion of Cuba? What is the senator saying that is like wow, yeah this is important? What have you highlighted there?

IVAN: "In Cuba alone, there are 15 million acres of uncut forest. There are mines of iron. There are millions of acres still unexplored."

BRYAN: Yeah, why would they include information like that? So why is that important? It said, "15 million acres of uncut forest. There are mines of iron." Why is that significant?

VICTOR: Resources.

BRYAN: So we have resources that are being used to build what? ...What else do we need? We just talked about industrialization. Building all these cities and skyscrapers and buildings. Why is it that these resources are so important? What are we going to use them for? ... Is there any other evidence that you can include in this category that will help address the resources you just talked about?

Graciela finds a quote in the text.

BRYAN: Graciela, read that to the group. I want you guys to talk about this quote and I'll come back. (Field notes, 11/18/08)

Table 5

Example of Team Chart for Document 1

Author/Date	Albert J Beveridge Senate Campaign Speech Sept. 16, 1898
Causes	America is expanding Acres of land has not been taking They will explore the land for better agriculture, richer soil to farm on, more space to build industries, more job opportunities, and more money.
Evidence	“Fellow Americans, we are God’s chosen people.” “15 million acres of uncut forest” “The flag of liberty will circle the globe...”

Throughout the class period, Bryan worked with groups to help them use their historical documents to identify causes for the invasion. He did not leave students to struggle on their own but rather assisted them in their comprehension and understanding of the historical texts. Bryan linked ideas from the text to content they had previously studied in class (e.g., Industrial Revolution) and to the larger historical context. Through ongoing questioning and scaffolding, he helped students understand the main ideas of their assigned documents and to identify causes for the U.S. invasion using evidence from the texts. After the class reviewed all nine documents over a 3-day period, Bryan guided students in writing their essays evaluating the following statement: “The explosion of the U.S.S. Maine caused the United States to invade Cuba in 1898.” Bryan provided students with a handout (see Appendix T) to scaffold their writing and asked them to decide whether they agreed or disagreed with the statement:

Do you agree with this explanation? We’ve looked at a lot of different evidence.

Do you agree with this explanation of the causes of the Spanish American War?

This is also at the top of your paper in the first box. Why or why not? Write that down. Look at it based on your evidence...I’m not looking for whether it’s yes or

no. There's not a right or wrong answer, but we're going to base this on your evidence. You're basing this on your evidence. What did you learn from these nine documents, plus the video that we watched, plus the textbook excerpt? ... So you have 11 different sources of information to pull from to help you better answer this question. (Field notes, 11/18/08)

In assigning this essay, Bryan emphasized the interpretive nature of history by prioritizing the use of evidence in students' arguments rather than a specific answer. Once students decided whether or not they agreed with the statement, Bryan instructed them to write a thesis statement.

BRYAN: A thesis statement is I agree with something or I don't agree with something and why I either agree or I don't agree with it. And an example of that is here. Anthony, would you read this for me please?

ANTHONY: "The U.S. invaded Cuba to support the rebels and their fight for independence, an interest that existed long before the explosion of the Maine."

BRYAN: Okay. So what is this person saying about what they believe about that statement that we read earlier? Do they agree with it or not agree with it based on what we've read here?

YOLANDA: They agree with it.

BRYAN: Are you sure?

PAUL: I think they don't...

BRYAN: Why do you say they don't?

PAUL: Because it said an interest that existed long before the explosion.

BRYAN: Good and that should have been your clue. Existed long before the explosion of the Maine. So they don't agree with it. So their thesis statement says I don't agree with the statement and here's why. And in the rest of essay they are going to support this statement with what?

PAUL: Evidence.

BRYAN: Evidence. They are going to support it with quotations that we pulled from our evidence from our documents, and you are going to use at least three of those in your essays. #3 is where you will write those three quotes (see Appendix T), those pieces of evidence that you will include. (Field notes, 11/19/08)

In the above excerpt, Bryan explained the concept of a thesis statement and provided an example for students. Once they drafted their thesis statements for the essay, Bryan verified students' work to make sure they were ready to proceed to the next step, which involved selecting three pieces of evidence from the documents to support their arguments. Bryan instructed students to use quotation marks and to explain their chosen evidence:

In your evidence, make sure that you are explaining where the quote is coming from. Because if you just throw the quote in there, it doesn't really explain what is going on. Where is the quote from? What does this have to do with your argument? How does it support your argument? (Field notes, 11/19/08)

After completing the graphic organizer, students worked in pairs to share and evaluate their chosen evidence, and then they wrote their essays independently.

Throughout the Spanish American War inquiry, Bryan carefully scaffolded students' reading of historical documents by having them identify causes for the invasion

and evidence to support those causes. At the end of the inquiry activity, students used this evidence to support their arguments in response to the statement of whether or not the explosion of the Maine *caused* the U.S. invasion of Cuba in 1898. Students had the opportunity to form their own interpretation as long as they provided evidence from the texts to support their reasoning. Bryan's emphasis on evidence-based thinking and causation, which are two key elements of historical thinking, were the major strengths of this lesson activity.

Using Historical Documents to Understand Historical Issues: A Focus on Close Reading and Comprehension

During Bryan's World War II unit, he continued to incorporate historical documents in his lesson activities. A key difference was the end product, or his students' culminating assignment, for each unit activity. In the imperialism unit, students synthesized their ideas across multiple sources of evidence to support their arguments regarding the causes of the U.S. invasion of Cuba. In contrast, during the World War II unit, students used texts to think about and better understand a historical event or issue, but they did not construct their own historical interpretations.

During the World War II unit, Bryan regularly used historical documents to teach specific historical content. Towards the end of the unit he had students read six excerpts from primary and secondary sources (see Appendix U for documents and assignment) to better understand President Truman's decision to drop the atomic bomb. Bryan highlighted the source of each document and the historical context (both key aspects of historical thinking) while students identified the author's position on dropping the bomb

and evidence to support his position. The following excerpt shows how Bryan guided students in their reading and analysis of the first document:

BRYAN: The first document... is from whom?

STUDENT: The Committee on Social and Political Implications.

BRYAN: The Committee on Social and Political Implications Report to the Secretary of War. And this is June 1945... And this would have been given to President Roosevelt before he died. What do they think about nuclear power based on this? They say, "Not only is it an important addition to the technological and military power of the United States but creates grave." What's grave? Is grave a good thing?

JUAN: No.

BRYAN: Okay not so good. "Grave political and economic problems for the future of our country. We believe the use of the atomic bomb for an unannounced attack [against Japan] is inadvisable." What's inadvisable?

JUAN: They don't advise it.

BRYAN: Yeah they don't advise it. They don't recommend it. So "if the United States were to be the first to release this new means of destruction." What do they mean by that? The first to release?

MICHELLE: The first to use it.

BRYAN: The first to use the bomb, yeah. "We would sacrifice public support throughout the world." What does that mean?

CARLOS: We would lose our allies.

BRYAN: Okay we would lose our allies. We would lose public support from those people that have supported us up to this point. “And risk the possibility of reaching international agreement in future control of such nuclear weapons.”

What are we saying there? (Field notes, 02/23/09)

Byran routinely scaffolded students’ reading of historical documents and guided their comprehension of the main idea(s). In the above excerpt, he helped students understand that the Committee on Social and Political Implications did not support using the atomic bomb to end the war. After reading the document together and helping students understand the basic ideas of the text, Bryan led students in completing their graphic organizer (see Appendix U):

BRYAN: Under source # 1, what is a piece of evidence or a quote that states their position? What quote could we pull out of this little excerpt to put in this first box under source #1 that tells us the position that they have taken on this issue?

CHRISTINA: “The use of the atomic bomb for an early unannounced attack against Japan is inadvisable.”

BRYAN: Perfect. Does everybody see that? The third line. “The use of the atomic bomb for an early unannounced attack against Japan is inadvisable...” So what is their position on the atomic bomb? In your words, not in theirs...What are they trying to tell the President based on that quote? ... Based on this quote that Christina pulled, what position did they take on the atomic bomb? ...What are they trying to tell the President, in your own words, based on that quote?

JAVIN: Bombing Japan would be a bad idea.

BRYAN: Okay. This idea that bombing Japan may not be the best idea because of these issues that we talked about. We would sacrifice support and we may sacrifice the ability to negotiate down the road. So the position on the atomic bomb? They don't think it's going to be a good idea based on those reasons. Does everyone understand where we got that? (Field notes, 02/23/09)

After reading the first document together and identifying excerpts in the text that reflected the author's position, students worked in their teams to read one additional document and then shared their information with the rest of the class. The following is an example of one group reporting information about their assigned document, an excerpt from President Truman's diary:

KORDELL: Well we got two quotes... The first one was on the first paragraph on the second line: "Thoughts of my ancestors being unhappy with my decision kept flashing through my mind."

BRYAN: What's that mean?

KORDELL: He felt guilty of doing it...

BRYAN: Ah, yeah. How many (of you) have ever been haunted by your ancestors? ... Here he is concerned about a decision that he has to make and what decision this is going to have on his upbringing based on what his ancestors would have done. When I was growing up I always heard this phrase. Whenever I got in trouble my mother would say, "If your great grandmother was alive she'd roll over in her grave at seeing what you are doing right now..." The idea here is very similar to what President Truman is going through because his ancestors are probably not going to choose the decision towards the bomb. They're very

pleasing people. They're probably not going to be happy if he decides to use the bomb. So that decision is going over and over in his head. It's "flashing through my mind" he says. What's the second quote then?

JOSIE: Second paragraph, first line: "But I wanted the war to end. I wanted life to become normal again."

BRYAN: Yeah what a great quote. "But I wanted the war to end. I wanted life to become normal again." So what does that say in terms of his position?

JOSIE: He's leaning towards using the bomb.

BRYAN: In that phrase, yeah. He is leaning towards using the bomb. Because why?

SAM: Because it would end the war.

BRYAN: Yeah, because he wants the war to end. He wants life to become normal again for all those people [who] are fighting in the war. Good quotes. Okay, so what do you think was his position that you put in the right hand box on # 3?

SAM: Conflicted.

BRYAN: He was conflicted. Yeah. He was really struggling with what his ancestors would think, but also struggling with trying to bring people home so that life can be normal again and the war would end. Good. (Field notes, 02/23/09)

Bryan helped students understand the difficult decision President Truman faced in whether or not to drop the bomb. He guided groups in their analysis and debriefing of their assigned document, and he made sure students understood the main ideas of their

assigned text. Students used evidence from their document to support their conclusion regarding the author's position on the prospect of dropping the atomic bomb.

Similar to other lessons, Bryan relied on the "jigsaw" method for this activity. The drawback of this strategy is that students only read one or two sources so it inhibited them from being able to corroborate across all texts to form an informed historical argument. When the class reviewed each team's document, students wrote down the information on their charts, but it was unclear whether they understood the entire context without actually reading all of the texts. After completing the jigsaw activity, students wrote a short essay in response to the following prompt:

In many ways, President Truman's decision to use the atomic bomb ended the war with Japan and strengthened the position of the United States against a new enemy.

- Identify and explain two reasons for President Truman's decision to use the atomic bomb in World War II that supports this statement.
- Explain how the common good of the United States led to the decision to use the atomic bomb.
- Include details and examples to support your answer. (Field notes, 02/24/09)

While the wording of this assignment allowed students to focus on causation and connected to the theme or essential question for the unit (How does the common good change in times of crisis?), it did not allow students to corroborate across texts to construct their own argument or use direct evidence from the texts to support an argument. Bryan asked students to summarize two reasons from the documents, but he

did not have students synthesize information across texts in response to an open-ended question (e.g., Why did President Truman decide to drop the atomic bomb on Japan?). Bryan instructed students to include “details and examples,” but he did not explicitly tell students to use quotes or evidence from the texts. This activity incorporated elements of historical thinking, but it was not at the same level as the Spanish American War inquiry assignment.

Throughout both units, Bryan integrated aspects of evidence-based thinking in conjunction with his emphasis on reading comprehension. At the beginning of the year he articulated his desire to incorporate historical documents in his instruction, to help students cite evidence in their writing, and to improve students’ reading comprehension so they would be successful on district assessments. Bryan’s teaching often reflected these goals, but one important difference between his two units was how he used primary sources and the extent to which he engaged students in historical argumentation. During the imperialism unit, Bryan’s students analyzed and cited multiple sources of evidence to support their arguments for the causes of the U.S. invasion of Cuba. In contrast, during the World War II unit and specifically during their analysis of President Truman’s decision to drop the bomb, students analyzed individual texts to understand the main idea and the author’s point of view, but they did not synthesize across documents to make an argument supporting a particular interpretation.

Teaching Students How to Read Historical Texts: Sourcing and Contextualization

In conjunction with teaching students to read, analyze and cite evidence in their writing, Bryan introduced two important strategies for reading historical texts—sourcing and contextualization. He primarily highlighted these historical reading strategies during

his lessons on the Spanish American War. Prior to reading the selected historical texts during the inquiry lesson, Bryan briefly reviewed “Parts of an Edited Historical Document” (see Appendix V) with students to highlight important elements of a text.

BRYAN: When you look at sources like the little ones we looked at today there’s [sic] some things that I want you to keep in mind to look at, and they are callouts here in this handout. The first is the head note. That’s in gray at the top, providing some information about this document. When it happened, who wrote it or said it, and it gives you a little more information about the background of the document. That really helps. Brackets... Sometimes these documents are very, very long and they’ve been adapted so that you don’t have to sift through pages and pages and pages. And I think every document we’re going to see is less than a page, probably about half a page. You may see brackets from time to time and that will tell you some things have been reduced so that you don’t have to go through all of that material. Sometimes it’s relevant, sometimes it matters and sometimes it doesn’t which is why they took it out. The ellipses will kind of tell you that same thing. And the last one is the source. What is a source?

KENDRE: Their names and when it was.

BRYAN: Okay and that will tell you also where this was taken from, if it was part of an interview or part of something else such as a speech, maybe an article that was written, it will show that down there. So you always look for these things which will help you better understand what it is you’re reading and make more sense of this. (Field notes, 11/12/08)

After reviewing this handout, Bryan guided students in reading the first document from the *New York Journal* (see Appendix S). In this excerpt, Bryan reviewed the head note with students and discussed the importance of the journal's writing style.

BRYAN: First let's start with the head note. Can somebody read that?

GRACIELA: "Purchased by William Randolph Hearst in 1895, *the Journal* published investigative and human interest stories that used a highly emotional writing style and included banner headlines and graphic images."

BRYAN: Okay, good. So there's [sic] a couple of things to think about here. He published investigative and human interest stories. What is a highly emotional writing style? What's that mean?

MARIE: Dramatic.

ANTHONY: Interesting.

BRYAN: Yeah. Dramatic. Interesting... Why is that important when we talk about an invasion to know that somebody's being dramatic in their writing? Why is it important to know what someone's writing style is like if we're trying to investigate something?

GABE: If over-dramatic, you might exaggerate the truth. If you're under-dramatic, you might not tell the whole story.

BRYAN: Good. So we need to keep that in mind. Yesterday we talked about are the sources reliable? It's something to think about here too. Are they telling us the whole story, the real story, their perspective of the story? (Field notes, 11/13/08)

After reading the document, Bryan highlighted the importance of when the article was written in relation to when the explosion of the Maine occurred:

BRYAN: When did the Maine explode based on the textbook excerpt? When did that occur? I know the year but what date?

JUAN: February 17th.

IVAN: February 15th.

BRYAN: 15th, yes. So when was this printed? This article?

MICHELLE: The 17th.

BRYAN: The 17th. Two days later. Hmmm. Pretty fresh in everyone's mind.

(Field notes, 11/13/08)

After the class read and analyzed this first document together, students split into teams to read two of the remaining eight documents. While reading each assigned text, students were to identify and answer questions about the author and date. The following is an example of the class reviewing an excerpt from the Monroe Doctrine (see Appendix S for document).

BRYAN: What is it that we're looking at? What type of a document?

ANTHONY: Monroe Doctrine.

BRYAN: Okay, the Monroe Doctrine. Who is Monroe?

CARLOS: President.

BRYAN: President of what?

CARLOS: United States.

BRYAN: Is it a telegram, a letter?

JAVIN: Message.

BRYAN: I think at the bottom it says speech. Okay, message to Congress... Let's think of the time period here. When did we talk about the explosion of the Maine? On or around what date?

STUDENTS: February 17th.

BRYAN: What year?

STUDENTS: 1898.

BRYAN: Yeah around 1898. When was this written?

GABE: 1823.

BRYAN: So we're about 60 years ahead of our time here because this is older.

1823. Now what is President Monroe saying in this document that helps us better understand the approach that the U.S. is going to take? (Field notes, 11/18/08)

In this discussion, Bryan placed the document in its historical context and related it to the topic under investigation. Although the Monroe Doctrine was written 75 years before the Spanish American War, it helped explain U.S. foreign policy during the 19th century.

Throughout these inquiry lessons, Bryan had students identify the author and date of each historical text and they discussed the importance of source information. One historical concept that Bryan did not regularly discuss was source reliability, and sometimes it was unclear whether he had a strong understanding of how to assess the reliability of historical accounts. Bryan discussed source reliability in terms of whether or not the author was trustworthy rather than analyzing reliability as a spectrum in relation to an author's biases and viewpoints. While questions related to the source and context came up frequently during the Spanish American War lessons, they did not occur as often during the World War II unit. Bryan sometimes had students identify the author and date

of texts that they read, but they did not spend as much time discussing the context or reliability of various accounts. Rather, Bryan had students focus primarily on comprehension and citing quotations from the texts when answering questions.

While Bryan had students identify source information when reading documents and emphasized its importance during the Spanish American War lessons, he did not always have students mention sources by name or evaluate their reliability in their writing:

You can't just throw the quote in there. You have to know where it comes from.

Is it from Document H or Document E is fine, but I also have to know, well why did you put this in here? Well I put it in there because this supports the reasoning on why I don't agree with this statement. Or this supports the reasoning of why I do agree with this statement (Field notes, 11/19/08).

Bryan emphasized identifying and explaining evidence, but he did not have students discuss the author and how his perspective may have influenced the content of the text. Subsequently, during the World War II unit, Bryan did not instruct students to identify the source or context in any written assignments. The focus remained on integrating quotes or evidence from texts but not on evaluating or analyzing that information to form an argument.

Bryan's teaching of historical reading strategies was still developing at this stage in his teaching practice. Whereas he acknowledged the importance of sourcing and contextualization, he devoted more time to doing so during the Spanish American War unit when the curriculum materials from *Historical Thinking Matters* highlighted their importance. Bryan's instructional methods often prevented students from learning to

corroborate across historical texts. He usually had students read individual texts as a means of understanding a particular topic or issue in U.S. history, but he did not always ask summative questions that required students to read and corroborate across multiple texts. Since students usually read only one or two documents out of a larger set, it was difficult, if not impossible, for them to strategically pull evidence from various texts to build a historical argument. This “jigsaw” method was valuable when trying to cover lots of information in a short period of time, but when used almost daily, it did not facilitate students’ understanding of the larger context. Bryan’s decision to not have each student read complete sets of documents directly related to his need to cover content and prepare students for district end of unit exams.

Historical Thinking and Content Coverage: Complimentary or Competing Demands?

Bryan incorporated aspects of historical thinking in both of his units; however, the extent to which he engaged students in historical interpretation varied. Although Bryan did not explicitly articulate the goal of wanting students to understand the interpretive nature of history, it became part of his lessons during his imperialism unit. His inquiry lesson on the Spanish American War served as a starting point for teaching students to think about history as more than just factual knowledge. He emphasized using evidence to answer the inquiry question rather than historical facts and right answers: “The idea here is not what’s right, what’s wrong...What we’re looking for is, does it answer the question? ...What led the US to invade Cuba?” (Field notes, 11/13/08). During the World War II unit, Bryan did not facilitate a similar inquiry activity, and he shifted the focus to

covering content and reading comprehension. He used many primary and secondary sources, but he did so in a way that preserved a fixed overarching narrative.

Using historical texts to convey a story. Bryan regularly had students read historical accounts in his class, but he often used these texts to communicate a fixed story to students. He emphasized basic comprehension and understanding of main ideas so that students could understand the big picture surrounding historical events. For example, at the beginning of the World War II unit, Bryan wanted students to understand the transformation in U.S. foreign policy from one of isolationism to involvement in world affairs. He articulated one of his goals for the unit during a post-unit interview:

I wanted them to understand obviously the story—the story of from isolationism to defending democracy anywhere in the world. This idea that now we’ve gone from here to here, what happened that made us change from an isolationist country to one that’s going to defend democracy anywhere in the world? There were a lot of events that happened during that time. What impact did it have on Americans? And I drove that home in a lot, and I still do, what impact does this have on Americans at home? People on the home front? What impact is that having on them? (Interview, 03/24/09)

To help students understand the change in U.S. foreign policy, Bryan selected and modified five texts that spanned from December 1940 to December 1941 (see Appendix W). These documents outlined the United States’ gradual involvement from lending weapons and supplies to Europe to direct involvement after the invasion of Pearl Harbor. When students read their assigned document in small groups, they identified the main idea and significance of the text in addition to the date and author. Bryan explained that

he wanted students to understand the process of how the U.S. got involved over time and that it did not simply occur overnight. After each group shared the ideas about their assigned document with the rest of the class, Bryan had his students respond to the following question: “What events and actions led the U.S. from isolationism to involvement in World War II? Include AT LEAST TWO quotations from the sources provided as part of your answer” (Field notes, 02/06/09). This question required students to cite quotations in their response, but it emphasized content knowledge and summarization of a specific answer.

In addition to understanding this shift in foreign policy, Bryan wanted students to understand how life changed on the home front during the war. In studying life for minority groups, Bryan had students read a document by an African American, a woman, or a Japanese American. Students were to consider the impact of the war on the minority group and how this in turn impacted the common good. Bryan’s goal was for students to understand the experiences of various individuals as described through primary source documents rather than through authorless texts, such as a textbook. He commented in a post unit interview,

The kid is like, yeah we get more stories and we see more things of what people are. And I mean granted they may be just feeding me what I want to hear, but that is the goal I’m trying to get them to think about. The idea of these are real life stories that people experienced and thoughts that people had and it impacts history more than...what a textbook is feeding you. (Interview, 03/24/09)

In the World War II unit, Bryan used primary and secondary sources to share stories of the past with his students. He used multiple texts to share *his* interpretation of

how historical events unfolded, but he did not have students analyze evidence to form their own interpretations of past events. Bryan used primary sources to vivify the perspectives and experiences of individuals from the past as a way of shedding light and understanding on historical events. But students did not corroborate across texts to formulate their own perspective or argument about how to interpret individual or group experiences.

Content coverage: meeting county and department demands. Bryan not only used primary and secondary sources to share stories with students, but also to cover content delineated by the county and assessed on mandated unit exams. These exams prioritized content over thinking skills and included 20 to 25 multiple choice questions and 2 to 3 brief constructed response items. To prepare students for these exams, Bryan gave students multiple choice questions as warm-ups at the beginning of class. He explained the purpose of his warm-up questions:

It's funny because... I rewrite a lot of test questions and use them as warm-ups and the first unit, kids really don't believe when I say, "You are going to see this again." They really don't believe me and then they see the first test and the next day, what is the reaction on everybody's face? I didn't realize we saw almost all those questions before in some shape or form. I'm like, "Do you think I go through this fiery hoop of warm-ups everyday just for kicks? There is a purpose so that you better understand it and know it so that we can get through this hoop of a test." (Interview, 03/24/09)

Bryan also used quizzes (multiple choice and short answer format) midway through his unit to assess students' content knowledge that would be later tested on the summative

assessment. He referred to county exams as “hoops” that he and his students had to jump through. He thought it was his job to prepare students, but he didn’t sacrifice all of his instructional time to do so.

Bryan’s main strategy for covering content involved using primary and secondary sources to explain different topics. For example, the World War II unit exam included questions on the Truman Doctrine, Marshall Plan, North Atlantic Treaty Organization (NATO), Yalta Conference, and Potsdam Conference. Rather than instruct students to find these vocabulary terms in their textbooks or give them notes in a lecture, Bryan had them read an assigned text and identify the main idea and its impact on the common good to connect back to his unit essential question (see Appendix Y for example documents and chart). In this case, Bryan used primary sources to cover content in preparation for the county exam, but he also used them to build students’ reading comprehension and to help students identify information in the text that provided insight about the author’s perspective. When students analyzed single historical documents, they engaged in aspects of historical thinking (e.g., sourcing and understanding the author’s perspective), but they did not fully participate in the inquiry process to construct an argument about the past.

Although the district curriculum and assessments covered a significant amount of content, Bryan made an effort to incorporate historical texts and group activities almost daily in his class. On occasion he used county materials and usually it was due to their direct alignment with the mandated summative assessment. During the World War II unit, he used a war strategies activity from the curriculum to cover assessed content about how the U.S. helped win the war. He explained his decision to use the county materials:

Ultimately in terms of how they are tested unfortunately on this unit, (CCPS) wants them to know what are the four strategies that the U.S. had for winning this war. That was the purpose for why I even covered it. To me it's not a very sexy topic to be covering in class and there's not a lot of meat to it so that's why it's one of those kind of have to cover subjects as part of the curriculum...I mean if I had no testing requirement, I would throw out that portion...My focus isn't on those battles and on those wars, it's bigger picture kind of stuff. (Interview, 03/24/09)

Bryan chose to use curriculum materials as a last resort because he preferred to design his own lessons and use his own resources to share with students. Although he frequently departed from the county's curriculum materials and suggested activities, he did not change or add to the actual content to be covered in the curriculum. For example, when teaching the unit on World War II, he did not have students learn about the Holocaust, which is covered in the county's 11th grade world history course. When asked why he chose not to include it in his U.S. history course, he explained that he had asked his team leader⁴¹ about incorporating an internet inquiry on the Holocaust, but the idea was rejected: "That's world history. We don't get into that. We don't have time." (Interview, 03/24/09)

The county curriculum and exams had a significant impact on how Bryan designed and implemented instruction. In the World War II unit, Bryan tried to meet his own goals for teaching historical thinking while also covering content to meet externally imposed goals. This resulted in Bryan incorporating a lot of documents in his teaching but in a way that did not necessarily promote historical thinking. He used the documents

⁴¹ Bryan's team was comprised of the school's U.S. history teachers.

to communicate a fixed story about the war to students and to cover topics that would later be tested on the county exam. Without ready-made resources (e.g., from *Historical Thinking Matters*) that prioritized historical thinking, Bryan struggled to engage students in authentic discipline-based activities that encouraged evidence-based thinking and historical interpretation.

“A Tale of Two Units”: A Summary of Bryan’s Practices

Bryan’s units presented two different images of his instruction. While he integrated elements of historical thinking (e.g., sourcing, contextualization, and evidence-based thinking) in both units, his focus shifted from historical interpretation in the first unit to reading and analyzing individual historical documents in the second unit. During Bryan’s imperialism unit, he had his students focus on historical inquiry and interpretation. He engaged students in a lengthy inquiry lesson about the Spanish American War. Students read multiple sources of evidence to analyze causes of the U.S. invasion of Cuba, wrote arguments in response to an inquiry question, and cited evidence from the documents to support their reasoning. In contrast, during Bryan’s World War II unit, he used historical documents to cover content and teach a particular story in U.S. history. In this unit Bryan did not present history as a discipline grounded in interpretation; rather, history assumed a more traditional role in that students learned about details and events of the past.

In planning and implementing instruction, Bryan relied primarily on outside resources and activities rather than the district curriculum materials. He spent countless hours researching online databases, editing historical texts to make them more accessible to his students, and designing his assignments. Bryan used a lot of team-oriented

activities in his classroom and had students work in groups when reading and analyzing documents. Bryan regularly used the “jigsaw” method of instruction, which allowed him to cover a lot of content in the curriculum, but it also meant that students only read pieces of the story. As a result, they did not have the opportunity to corroborate across multiple texts to construct fully reasoned interpretations about the past.

Bryan tried to maintain his goals for student learning (e.g., identifying and using evidence in writing) and meet the expectations set by his district and school. His efforts to simultaneously teach historical thinking and cover content to prepare students for standardized exams conflicted with one another. As a result, his units differed in the extent to which students engaged in historical analysis and interpretation. When Bryan had ready-made resources (i.e. lessons from *Historical Thinking Matters*) for his Spanish American War unit, he was better able to teach historical thinking. The district’s World War II unit covered a lot of content in a limited amount of time, and as a result Bryan used documents (rather than a textbook or lectures) as a means for students to learn about various topics and events. He had a fixed interpretation or story about the war that he wanted to communicate to students, and he used individual document analysis to teach students that story. As a result, students were left with limited opportunities to challenge ideas or construct their own interpretations. Chapter 7 examines in further detail how various factors, such as the district curriculum, contributed to Bryan’s instructional planning and decision making.

Chapter 6: Providing Limited Opportunities to Teach Historical Thinking—A

Glimpse into Maya's More Traditional Instructional Practices

Maya began her first year of fulltime teaching with an understanding of the interpretive nature of history, which she had articulated at the end of her teacher education program:

History is an account of the past that can be interpreted through multiple perspectives. It is not merely a book of facts; it requires analyzing the past using primary and secondary sources using the skills of sourcing, contextualizing, and corroborating to make claims about how, what and why events and ideas occurred and existed. (Post assessment, May 2008)

Maya understood the role of analyzing evidence and how different historical interpretations could result depending on one's point of view. She recognized the need to consider the author and the historical context of the document and to compare across accounts. Given this disciplinary understanding, how then did Maya teach history to her high school students?

An Overview of Maya's Instructional Units

Since Maya's school had a block schedule with 85-minute class periods, her units included fewer days of instruction than Steve and Bryan's units. The U.S. imperialism unit lasted for six days while the World War II unit lasted for seven (see Appendix Y and Appendix Z for detailed outlines of unit activities and content). For the first observed unit, Maya used a central question to address one major theme—what causes imperialism? She aimed to link her lesson topics with this unit question while introducing

her students to basic historical thinking strategies (e.g., sourcing and evidence-based thinking).

In her pre and post imperialism unit interviews, Maya explained her desire to integrate more primary sources into her teaching and to have students learn to use quotes in their historical writing. The first three days of the unit focused on U.S. interests in the Philippines, Hawaii, Japan and China. During these lessons, Maya relied primarily on the textbook and its supplementary materials, which included some excerpts from primary source documents. The final three days of the unit focused on the Spanish American War and reasons why the U.S. invaded Cuba.⁴² Similar to Bryan, Maya used materials from the online resource, *Historical Thinking Matters*, for these lessons. She selected primary source documents from this resource and had her students read and analyze them in order to identify causes of the Cuban invasion. While Maya focused on content knowledge during the first half of her unit, she made an effort to incorporate resources and activities that reflected aspects of historical thinking during her lessons on the Spanish American War.

In comparison, Maya's World War II unit focused almost exclusively on coverage of content. She introduced multiple topics in single class periods; she had no central question or theme to link topics within or across lessons. For example, on the fourth day of the unit, Maya briefly lectured about the Manhattan project, Pearl Harbor, World War II propaganda, Japanese internment, and African Americans on the home front, but students did not examine any of these topics in depth. At the end of class she gave

⁴² Maya did not teach her imperialism unit in chronological order. When asked in her post-unit interviews why she chose to teach these topics in this particular order, she did not provide an explanation other than mention the county curriculum guide. However, when I referenced the county's pacing guide, it had the Spanish American War before imperialism in Asia. It was unclear why she did not teach these topics in chronological order.

students a list of fourteen vocabulary terms (e.g., Adolf Hitler, blitzkrieg, Churchill, Pearl Harbor, V.J. Day, island hopping) to know for an upcoming quiz. This emphasis on content was reflected in Maya's stated goals for the unit:

I just wanted them to know the basics of why the United States got involved in the war, um, what happened while they were in the war, at home for minorities, um, and what really caused the end of it and...what happened to the countries that were involved in the war afterwards. (Post unit interview, 03/11/09)

Maya emphasized the basic facts and events of the war, but she did not make historical thinking central to her unit. Rather than have students analyze events and decisions surrounding the war, she had specific content that she wanted them to know.

Maya's assessments paralleled her instructional activities in that she prioritized content knowledge over historical thinking. Her formative assessments included students' homework (e.g., textbook questions) and quizzes (see Appendix AA for example) that emphasized factual content. Her summative assessments, which she had the autonomy to design herself, included true/false, matching, multiple choice questions and one or two open-ended questions (see Appendix BB).

Throughout the two units Maya periodically had students read primary sources, but she tended to focus on literal comprehension rather than use them as a means to teach students how to think about the author, context, or purpose behind the document. Maya did not link lesson topics in ways that helped students understand broader historical ideas or ways of thinking. Rather, her teaching assumed a routine that consisted of factual warm-up questions (e.g., what is the Manhattan project?); whole class lectures and note taking; and independent or pair work that often involved reading a textbook or document

excerpt and answering comprehension questions. Constructing history assumed a secondary or sometimes nonexistent role in the classroom while instruction prioritized vocabulary terms and basic information. Despite the prevalence of these practices, some of Maya's lessons, specifically those on the Spanish American War, had the potential to help students learn to think historically. What was different about these select lessons and how Maya taught history? The following chapter describes Maya's routine instructional practices, but it also highlights aspects of her teaching that attempted to incorporate elements of historical thinking.

Teaching History as Fixed Knowledge

Although Maya could articulate the constructed nature of history, she often took a different approach in her high school classroom. Her daily instructional practices emphasized content knowledge and historical facts. Every class began with a warm-up that required students to use their textbooks to define terms and answer basic recall questions. This routine was usually followed by activities, such as lectures, readings, and worksheets, which centered on information and finding the right answers.

Teaching *the* causes of imperialism. On the first day of the imperialism unit, Maya began class by asking students to answer the question, "What is imperialism?" using page 552 of their textbooks. She followed this warm-up with a brief lecture in which she defined additional vocabulary words, such as expansionism and isolationism, and provided students with three specific causes of imperialism: 1) "extend the idea of acquiring new land"; 2) "get more materials to build up land"; and 3) "expand your religious beliefs" (Field notes, 11/17/08). Maya then directed students to read an excerpt of a speech from Senator Albert Beveridge to identify these three causes of imperialism

in the text (see Appendix CC for a copy of the document, which was a supplementary resource from the textbook). She instructed, “Let’s look at one of the 3 possible reasons. Remember our essential unit question is, what causes imperialism? So it might be #1. It could be #2. It could be #3. And we’re going to look and see which ones that it could possibly be based on your primary source” (Field notes, 11/17/08).

While students read the document, they underlined reasons why Beveridge wanted the United States to remain in the Philippines and then answered a question at the end of the text: how does the author use American history to support his position? Maya told students to find the answer in the second paragraph of the text: “I am going to help you with that. Take a look at the second paragraph...With your pen, circle the second paragraph and that will really help you focus in on what the author is doing to make people think that hey, we need to do this. We need to stay in the Philippines to keep it” (Field notes, 11/17/08). The class then ended with a review of the day’s content:

MAYA: Really quickly we’re going to review what we did for today and see if met our objective...What was the warm-up question?

MASON: What is imperialism?

MAYA: What is imperialism? Very good. And we said imperialism has to do with two basic types of control. One type of control and another type of control. What’s one type of control we said? You can go back to your notes if you want and look real quick. What are two types of control that imperialism has?

MASON: Economic

MAYA: One is economic. Having to do with money, resources. And the next one has to do with?

RASHAN: Political

MAYA: Political. Having to do with government. Something like that. Then we went over two definitions of isolationism and expansionism. And what does imperialism fall under? Isolationism or expansionism?

SHEREECE: Isolationism

MAYA: Which one does it fall under?

SHEREECE: Expansionism

MAYA: Expansionism, right. Then we did a few notes and we looked at what causes imperialism and we came up with 3 major ones that we can see...We looked at the primary source. What were some of the things the primary source told us about imperialism? What kind of ideas did he have?

AALIYAH: To control the Philippines.

MAYA: To control the Philippines and he gave several reasons why. Give me one reason why he wanted to control the Philippines.

AALIYAH: Coaling stations

MAYA: The coaling stations so maybe resources. What was another reason why he wanted to stay in the Philippines?

ALEX: Spreading religion

MAYA: Maybe spreading religion. We're not totally sure. One other major thing. What else about the Philippines? The land, right? The land also.

(Field notes, 11/17/08)

In this lesson, Maya presented history as fixed information to be found in a particular source whether it be the textbook or a primary source document. Although she

presented students with the unit essential question—what causes imperialism?—she did not let students discover their own answer. Rather, she presented them with three specific causes of imperialism in her mini lecture and had them confirm one or more of those reasons by finding examples in the Senator Beveridge excerpt. The question at the end of the document also had a specific answer, and she hinted at where to find it in the document. The review at the end of class affirmed a goal of wanting students to remember specific information, including the vocabulary words and the three stated causes of imperialism. This emphasis on content aligned with Maya’s summative assessment, which tested factual knowledge via objective questions (i.e. multiple choice and matching).

When introducing this unit and the concept of imperialism to the class, Maya did not discuss the historical context to aid student understanding. From this lesson alone, it was unclear what preceded this unit. What had students been studying about United States foreign policy up to this point in history? What led the U.S. to have more imperialistic aims at the end of the 19th century? Students read the speech excerpt by Senator Beveridge without having knowledge of when this speech occurred and why it was delivered. Maya taught this lesson outside of its historical context and thus it became a lesson in vocabulary and about generic causes for imperialism rather than a lesson about U.S. foreign policy during a particular historical period. Despite having a unit essential question—what causes imperialism?—Maya chose a rather broad question that was not specific to the historical context of the late 19th and early 20th centuries. She did not use the question to link daily lessons or provide students with opportunities to answer the question from their own perspective. Maya did not have students learn about

imperialism on a conceptual level; rather, she had specific content about imperialism that she wanted them to know. This failure to teach the big ideas and link them in any meaningful way for students continued during the World War II unit.

The “who” and “what” of World War II: Focusing on important individuals and events. Review of the activities and content taught in the World War II unit (see Appendix Z) revealed that this unit emphasized content and basic facts rather than historical thinking strategies. Maya introduced multiple topics each day without discussing the historical context or the big ideas surrounding the war. For example, Maya began the unit by having students define inflation and the Treaty of Versailles and then had them identify totalitarian leaders. She introduced these topics without linking them to each other, to a larger theme or to students’ knowledge from previous units. How and when did the war break out in Europe? What was happening in the United States at the time? What major ideas did she want students to learn about the events surrounding World War II? The answers to these questions remained unclear throughout the unit.

Maya had a routine of teaching multiple topics or vocabulary terms in a single day. The second and third days of instruction centered on how the United States moved from a position of isolationism to one of involvement in the war. She had students define vocabulary terms and answer questions in the textbook as they moved from one topic to the next.

MAYA: Last time we started talking about a war. What war did we start talking about?

RUBEN: World War II

MAYA: We’ve been talking about World War II. Let’s review really quickly

some of the vocabulary we learned last time. Totalitarian. Who can remember what totalitarian is? You guys don't remember? Totalitarian?

AALIYAH: A type of dictator.

MAYA: Okay a type of dictator. Someone who maybe has total control. Give me an example of a totalitarian leader. Remember we watched the video clip...

DESHAWN: That guy, Mussolini.

MAYA: Mussolini. And what country was he from?

DESHAWN: Italy

MAYA: Italy, good. Give me another one besides Italy and Mussolini.

RUBEN: Adolf Hitler, Germany

MAYA: Adolf Hitler, Germany. Give me one more. Who was the guy from the Soviet Union, the dictator?

GABBY: Stalin

MAYA: Stalin, okay good. We're going to get started with the warm-up. It says define appeasement...Somebody read me what you have. Define appeasement from book.

JESSIE: Appeasement is giving into aggressive demands to maintain peace....

MAYA: These are the vocab that hopefully we'll look at today. There's blitzkrieg, appeasement, neutral, quarantine speech, and attack on Pearl Harbor. Hopefully by the end of this we'll be able to figure out what these vocab mean.

(Field notes, 02/17/08)

To give students an example of appeasement, Maya had them read two quotes from the textbook, one by Arthur Neville Chamberlain and one by Winston Churchill

(see Appendix DD for quotes), and answer the following question: How does Chamberlain's comment hint at why Churchill's warnings went unheeded in 1938? The following is an excerpt from the class's discussion.

MAYA: There are two different opinions that we have here. On the left side of the page [he] agrees with appeasement and on right side of the page someone who says you... can't give into the demands of someone who is a dictator so he doesn't agree with it...He's [Chamberlain] the prime minister so [he's] like a president. And on the other side we have Winston Churchill [so] compare and contrast what they are saying.... What do you guys think of this question?

SHEREECE: They should just stay away...

MAYA: Very good. Chamberlain did not believe Britain should reject cooperation because it could lead to peace. The next thing I want you to do is go to page 746. Does anyone know what blitzkrieg means? Actually means lightening war and German strategy in war. Can see simulation on page 746....On page 747, answer that question. What was the main element on which this type of warfare depended? ... How did Germans accomplish blitzkrieg?

MASON: Tanks

AALIYAH: Strong air force

MAYA: What else?

LUIZ: Advanced military

MAYA: Okay advanced military or strong technology would be a good answer for that one. (Field notes, 02/17/08)

As described in these lesson excerpts, Maya moved from topic to topic (e.g., appeasement to blitzkrieg) without connecting ideas in a meaningful way. She relied on the textbook as her primary resource, and students were not involved in in-depth discussions or historical analysis. For example, the class did not discuss who Chamberlain and Churchill were, how their positions influenced their political views, or how their beliefs compared to those of citizens of Great Britain in the late 1930s. The larger historical context was absent from the lesson so students did not have much background knowledge to help them understand Chamberlain and Churchill's views. Maya had particular content in mind that she wanted students to know and this guided her chosen instructional activities. The following day, Maya used vocabulary terms to teach students about the gradual involvement of the United States.

MAYA: What was Roosevelt's quarantine speech? And I put the page number there for you. What did you guys find? Anyone?

MARIA: Speech that Roosevelt made to quarantine all the warring countries and only trade with peace countries.

MAYA: So it was a speech where Roosevelt was talking about countries that were in the war. We're talking about Japan, Germany, all the axis powers that are going into other countries. What he said was countries should only trade with those that are peace loving and not ones that spread war. If you quarantine something, what do you do?Why do you think Roosevelt's speech is called the quarantine speech that could be related to what he's talking about? Isolating countries, not allowing them to spread. What could that mean?

AALIYAH: Not allowing them to spread war to America.

MAYA: Okay not allowing them to spread war to America. Maybe other places too, right? What I would like to do is for you guys to go ahead and...look at these three terms in your book so you need a sheet of paper for this. All I want you to do with these three terms is there is cash and carry, lend-lease act, and Atlantic Charter. All I want you to do is define and draw a symbol... Really easy. All you have to do is copy it from your book and draw a symbol. Try to understand what it means also so want to read that on page 754 and 755.

RASHAN: Copy them down?

MAYA: Yeah, I want you to look at the top. Define it and draw a little symbol. This is so easy... All you have to do is copy the definition and draw a symbol to help you remember it...

MAYA: Today we're going to talk about how the U.S. got involved in the war... By looking at these three definitions here, does it seem like President Roosevelt is starting to think about getting involved?

JESSIE: Yeah

MAYA: It does seem like that. Jessie, why would you say that?

JESSIE: Because like he is starting to get involved but not with the war. He's providing Great Britain with um. They made something together that said they were going against the war with Hitler or against Hitler and he is giving them weapons even though they can't pay right now. And then he's saying that you can come and take U.S. goods as long as you pay in cash and pick them up at U.S. ports.

MAYA: Good so it does seem like he's maybe not ready to fully get into war but he's supporting the Allies, Great Britain and France. So really quickly let's go over these. Cash and carry. All you have to do is read your definition and then tell me what kind of symbol you could have drawn for that.

Students share definitions and symbols for vocabulary words.

MAYA: Let's see one thing, well there are several things here that might make them want to join the war, but let's look at one thing that might be a big contributing factor also. As we're watching the video clip...I want you to write a bullet point list...I want you to have a bullet point list basically just telling me what happened at Pearl Harbor. (Field notes, 02/19/08)

Maya used a list of vocabulary terms to explain how the United States moved from an isolationist nation to one that became more involved in international affairs. Without a detailed analysis of the United States' role prior to what transpired at Pearl Harbor, students were left with a simplistic view of how and why the United States became involved in the war. Maya presented these events free from a historical context and as a result, the story seemed incomplete.

This instructional routine continued throughout much of the World War II unit. On the final day of instruction, Maya discussed the dropping of the atomic bomb as part of her lesson on the end of the war and its aftermath. To cover these events, she provided students with a list of terms and their definitions on PowerPoint slides: these included VE Day, VJ Day, United Nations, Yalta Conference, Potsdam Conference, and the atomic bomb. When talking about the atomic bomb, Maya emphasized the importance of remembering the names of the two Japanese cities that the United States had bombed.

MAYA: The next part is we already know that the atomic bomb was part of the Manhattan project...What happens is that because Japan continues to fight, the United States uses the bomb on two major Japanese cities...So because Japan continues to fight even though after the Germans surrendered, the United States uses the bomb on two major Japanese cities, Hiroshima and Nagasaki. So when you have your exam, you want to make sure you remember which two major cities those are...

MAYA: Really quickly go to page 805 in your book...Look at the picture on page 805. It shows you a picture of Hiroshima. Does it look like there is much left after the bomb? That was one of the cities that was bombed. It says, nearly everything that was within a one mile radius of the blast was destroyed when an atomic bomb hit Hiroshima. Heavy damage extended three miles out...Lighter damage reached as far as twelve miles out of the center of the blast. You can see definitely there is water there in the middle and some of the waste might have went [sic] into the water also...Your book actually gives you numbers of how many people actually died. 80,000 people died and 35,000 people were injured according to what your book says. That's quite a lot of people.

SHEREECE: My question is so when these countries get into wars...they are killing innocent people too while they are down there.

MAYA: That's a good point. A lot of people said that some of the people in Hiroshima and Nagasaki were innocent and it was a controversy about whether or not to use the bomb in Hiroshima and Nagasaki because there were regular citizens that lived there, but this event really helped end World War II. So what

do you guys think? What's your opinion? Do you think you would actually use it on innocent citizens?

SHEREECE: No

MAYA: But it was effective in ending the world war.

SHEREECE: People are dying that have nothing to do with this.

MAYA: Why did they use it on innocent citizens? What are they trying to do though? The war was lasting how long? About 5 or 6 years, right? But what did Japan do to the United States? (Field notes, 03/03/08)

The discussion of whether or not to drop the bomb ended prematurely as students did not have the opportunity or the resources to adequately examine President Truman's actions. Maya did not provide students with an opportunity to read and learn about the historical context or the complex factors that contributed to Truman's decision. This particular historical event provided Maya with an opportunity to have students explore in-depth the complexity of the issue by examining primary and secondary sources about the decision to drop the bomb. Instead she taught this content using a short lecture and an image from the textbook.

Developing Teaching for Historical Thinking

Although the majority of Maya's teaching practices prioritized content knowledge and basic historical knowledge, some lessons (or parts of lessons) had the potential to help students learn to think historically. In both the imperialism and World War II units, Maya used primary source documents in her teaching and alluded to historical thinking strategies, such as sourcing and evidence-based thinking. However, the extent to which Maya explicitly taught historical thinking and gave students time to think about and

analyze documents in-depth varied. During the initial lessons on imperialism and during her World War II unit, Maya focused on reading comprehension and alluded to elements of historical thinking (e.g., subtext of a document) while students read single documents. Maya showed signs of more developed disciplinary practices during her Spanish American War lessons when she used a central inquiry question to guide students' reading of multiple documents; however, her focus on content coverage still overwhelmed her efforts to teach historical thinking and interpretation.

Using primary sources in the classroom: Focusing on reading comprehension with beginning-level historical thinking. At the beginning of the school year, Maya articulated her desire to have students read primary sources in her classroom. Maya incorporated historical documents periodically in her teaching, but she did not always explicitly focus on historical thinking or use the texts in ways that promoted in-depth analysis of the author, context and/or historical issue. For example, during the first half of the imperialism unit, students read excerpts from primary sources about the impending annexation of Hawaii in their textbooks (see Appendix EE for example document). Before reading each document, Maya directed students' attention to the author, but they did not discuss the importance of analyzing source information.

MAYA: So we're going to read document one and I want you guys to find for me who is writing the letter. Remember we always look at the source first. Who is writing the letter? Look at what it says there for document one. For document 1, who is writing this letter? Remember we always look at the source first. Who is writing that?

JOELLE: Princess Ka'iulani.

MAYA: Exactly. So it says a princess and who is she in relation to the queen?

MASON: The niece.

MAYA: The niece. She's the niece of the queen that we were talking about. She visits Washington DC to do what? So that they can get the power back for Hawaii. So let's listen to what she says. It's really emotional there on page 576. Let's see if we can figure out what's going on in this primary source.

(Field notes, 11/19/08)

Maya made the initial step of instructing students to identify the author of the text, but they did not discuss how the author's identity influenced her perspective. Maya hinted at the emotional language of the document (which is important when trying to understand the author's perspective), but she did not have students consider why the author would have had such an emotional reaction and personal interest in Hawaii's political affairs. When reading this document, Maya did not direct students' attention to the date. In 1893, how would a Hawaiian princess travel to Washington DC? What time and sacrifices did this entail? Thinking about various aspects of the historical context would have highlighted the significance of this trip.

Maya often used primary sources as a means to help develop students' reading comprehension, but she also asked questions that hinted at elements of historical thinking. After the class read the document excerpt by Princess Ka'iulani, Maya reviewed the basic meaning of the document and asked questions about the author's point of view.

MAYA: What does it seem like she is mostly upset about? Look at the first line.

What is she upset about that we've talked about today? What is the main thing?

GABBY: Christian missionaries.

MAYA: Christian missionaries. Why is she upset about the Christian missionaries? Look at the second question. It says, “Who gave them the authority to break the Constitution which they swore they would uphold?” What is it saying? The 3rd sentence. What does that mean? “Who gave them the authority to break the constitution?”

LABRON: They are supposed to have freedom of religion.

MAYA: Okay freedom of religion and also breaking the Constitution represents what? Political power, right? And at the end it looks like she’s almost maybe screaming. It says, “Millions of people who in this free land will hear my cry and will refuse to let their flag cover dishonor mine.” What does it seem like she wants to do?

LABRON: She wants to take the land back.

MAYA: Good so it seems like they want to take back that land. What I want you to do is answer those first two questions on page 577 where it says 1a and 1b (see Appendix EE for questions). (Field notes, 11/19/08)

Although Maya focused on reading comprehension, she also directed students’ attention to the author’s point of view and referenced direct evidence in the document during class discussion. Maya did not necessarily emphasize historical thinking and in-depth analysis in her lessons, but she tried to incorporate elements of historical thinking into her teaching practices. This pattern continued during her World War II unit:

MAYA: I want you guys to pay attention as we’re reading this primary source (see Appendix FF for copy of document) and then I’ll tell you what I want you to

actually do on it. Shereece, go ahead and start where it says interpreting the source. We have to figure out who is actually writing this before we read it.

SHEREECE: "On December 8, 1941, President Franklin D. Roosevelt appeared before Congress to ask for a declaration of war against Japan. His address was broadcast to Americans over the radio. As you read this excerpt of his brief speech, imagine how Americans listening to the radio reacted to his words."

MAYA: People all across America were listening to his speech about what happened at Pearl Harbor and what action he was going to take...

Class reads the whole document aloud.

MAYA: Find for me, anywhere in here, I want you to circle one sentence where you get Roosevelt's reaction to the attack. One sentence, circle it where you see Roosevelt's reaction, one of his initial reactions to the attack... Give me one reaction.

AAMIR: "So help us God."

MAYA: What does that tell you?

AAMIR: Asking God for help.

MAYA: Asking God for help? That's kind of a reaction but think about it a little bit more and I'll come back to you. What's another one you circled or underlined?

KRISTI: You said this was him speaking the whole time, right? "The United States of America was suddenly and deliberately attacked by naval and air forces of the empire of Japan."

MAYA: What do those words tell you? Suddenly and deliberately attacked?

AALIYAH: Like it was unexpected and did it on purpose.

MAYA: So that's one of his reactions. Very good, Aaliyah. Let me get one more...

JESSIE: "There is no blinking at the fact that our people, our territory, and our interest are in grave danger."

MAYA: What does that mean? "There is no blinking at the fact that our people, our territory, and our interest are in grave danger."

JESSIE: He is saying that Americans are in danger and you can't refute the fact that they are.

MAYA: Okay, very good. What I want you to do...is answer this question at the bottom: "What was President Roosevelt implying?" First of all, what does implying mean?

MASON: Saying it without words...

MAYA: Okay saying something without directly saying it. What is treachery? It says, what was President Roosevelt implying, so what was he really trying to say when he said that "this form of treachery shall never again endanger us"?

(Field notes, 02/19/08)

Similar to other lesson activities, Maya focused on helping her students understand the basic meaning of the text, but she also directed their attention to fundamental aspects of historical thinking. She had her students identify the author of the text, consider the subtext of the document (i.e. "What was President Roosevelt implying?"), and identify evidence in the text that supported President Roosevelt's reaction to the attack on Pearl Harbor. Even though the conversation did not proceed to

in-depth historical thinking and analysis, Maya introduced her students to beginning level components of historical thinking.

The beginning steps of historical inquiry. Despite Maya's focus on historical facts and reading comprehension, one set of lessons on the Spanish American War stood out as distinct from the rest. During this lesson sequence, Maya engaged students in an inquiry activity that asked them to respond to the following question: Why did the United States invade Cuba? To answer this question, students read four primary source documents, answered questions about the source and context for each text, completed a document chart (see Appendix GG for copies of the documents and chart), and wrote in response to the inquiry question on the unit assessment.

Maya began the inquiry lesson by having students read about the explosion of the USS Maine in an excerpt published by the *New York Journal* on February 17, 1898.⁴³ Students completed the first part of the document chart, which included identifying the date and author of the source, the cause(s) of the invasion suggested by the document, and evidence from the document to support these causes. Over the next two class periods, students read three additional primary source documents (*Awake United States, March of the Flag*, and *Reconcentration Camps*), answered questions related to each text (see Table 6), and completed the rest of the document chart.

⁴³ To understand the context of this journal publication, it is important to note that the USS Maine exploded on the evening of February 15, 1898.

Table 6

Spanish American War Inquiry: Document Analysis Questions

Document	Questions
<i>Awake United States</i> (song) Mary Elizabeth Lamb	1) When and where was this song printed? 2) According to this song, what happened to the Maine? 3) What emotions are the song's lyrics supposed to evoke? Include an example from the text. Use the highlighted text for clues.
<i>March of the Flag</i> (campaign speech excerpt) Albert Beveridge	1) This speech is part of Albert Beveridge's political campaign for Senate. How does that influence what you can expect of it? 2) According to Beveridge, what else was going on in the U.S. and the rest of the world that made expansion a good idea? Use the highlighted text for clues. 3) Why does the Senator mention the forest in Cuba?
<i>Reconcentration Camps</i> (telegram) Fitzhugh Lee	1) If they could have seen this letter, how do you think people in the US in 1897 might have reacted to this description of the reconcentration camps?

What distinguished these lessons from others was that Maya used multiple documents to engage students in historical thinking and focused on an overarching inquiry question: Why did the U.S. invade Cuba? She continued to give students close reading questions, but she also included multiple questions (which had been provided by the online resource *Historical Thinking Matters*) that explicitly focused on the source and context of the document. For example, the first question for the *March of the Flag* document (see Table 6) asked students to consider the type of document (campaign speech) and how that might influence what the author said and why he said it. It forced students to think about politically motivated speeches and their intended audience. The question paired with the *Reconcentration Camps* document (see Table 6) asked students to consider the context of the time period and how people would have reacted to the description of the camps provided in the letter. The strengths of this lesson sequence are clear: students read primary source documents; they answered specific questions about

the source and context; they identified causes to answer the inquiry question; and they identified evidence in the documents to support those causes. These strategies are important building blocks when learning to think historically.

Maya integrated historical thinking strategies in these lessons, but similar to her other imperialism and World War II lessons, she demonstrated areas for further development. She had students identify the author and date on documents, but she did not give students the opportunity to discuss or analyze sourcing or contextualization in-depth.

MAYA: I want you to flip to the song... the one that says *Awake United States*...

What was the date and who was the author? Let's review really quickly before we move on. What did you put for date and author...for this song? Look at your chart.

LABRON: I didn't get the date but the author was Elizabeth.

MAYA: Yeah Marie Elizabeth Lamb. And then what date was it written?

MASON: February 16, 1898.

MAYA: February 16, 1898. Good. So it was in between February 16th and April 25th. What was the main question that we talked about- why the United States invaded Cuba? So what cause did we say the United States invaded Cuba according to this document?

LABRON: The Spanish blew up the ship.

MAYA: Right, the Spanish blew up the USS Maine... What was the evidence? Find me the quote that you used.

GABBY: "By treacherous butchers paid by Spain."

MAYA: Okay good, that was a good quote...In the song it seems like they were trying to get the United States people to think that Spain did it.

(Field notes, 12/02/08)

During the class's discussion of the song, *Awake United States*, Maya reviewed the document chart quickly and in a manner that suggested she was looking for "right" answers. For example, when she asked students for the date when the document was written, one student responded February 16, 1898. Maya said "good" even though the answer was incorrect and then clarified that it was written some time in between February 16th and April 25th. She did not ask students questions about the importance of these dates. What was significant about February 16th? What happened on April 25th? Why would the author write this song during that time period? Maya did not point out that these dates reflected the time period between the explosion of the USS Maine (which occurred on the evening of February 15th) and when the United States formally declared war against Spain.

Even though Maya had students identify sourcing information and excerpts in their documents, she did not explicitly discuss historical thinking strategies with the class. After they read *Awake*, Maya recognized the intentions of the author (e.g., "It seems like they were trying to get the United States people to think that Spain did it"), but she did not fully explain the author's purpose to students. Similarly, while reviewing each part of the document chart, Maya did not have students discuss in detail the causes or evidence that they had identified. The students completed important steps involved in historical thinking (e.g., identified the author and date of each document), but overall the class focused more on completing the activity than actually engaging in thinking (i.e. students

did not think about the details of the document or use them to interpret the text). This inquiry activity provided a framework for historical thinking and had the potential to engage students in historical interpretation, but Maya was still developing in her ability to make these strategies explicit to students and to design activities that provided students with opportunities to think about and analyze texts in-depth.

Teaching historical writing. Maya explained that one of her goals for this unit was to get students to use and explain quotes in their writing: “I really do want them to be able to read a primary source or a short text and be able to take a quote out and explain what it means and make their own opinion about what’s going on” (Interview, 12/12/08). After students read and analyzed the four primary source documents in the Spanish American War activity, Maya wanted them to respond to the inquiry question: Why did the United States invade Cuba? To scaffold students’ writing, she provided them with an outline template (see Appendix HH), which guided them in writing a thesis statement, providing reasons for the invasion, and selecting and explaining evidence to support their arguments.

Prior to writing a thesis statement in response to the inquiry question, students practiced writing thesis statements about a topic of personal interest (why they should not have to wear uniforms in school) to better understand the concept. Following this exercise, Maya asked students to state reasons why the United States invaded Cuba. Students stated their causes and Maya wrote them on the board: 1) the U.S. believed that Spain blew up USS Maine; 2) the U.S. was interested in Cuban natural resources; 3) the U.S. wanted to expand; and 4) the U.S. went to help save Cubans in reconcentration camps (field notes, 12/04/08). Maya then instructed students to choose three of these four

reasons and include them in their thesis statements and outlines. She had students practice selecting and explaining evidence by doing the first one together as a class. Maya instructed students to write the following for reason #1: “The U.S. invaded Cuba in order to get natural resources such as wood and iron” (Field notes, 12/04/08). She then asked them to find and explain evidence to support this reason using their document charts.

MAYA: What is evidence or a quote from the chart that you could use to support your statement? Look at B on your chart...

MARIA: They had acres of forest that hadn’t been acquainted with the axe.

MAYA: Very good. So the evidence in the quote. Some of you wrote it down, didn’t you? What was the one that was unacquainted with the axe? So here it is. Here is evidence you are going to use for that. In Cuba, there are 15 million acres of forest unacquainted with the axe. So that’s the evidence you are going to put.

That’s of course the reason right. Reason is that we wanted natural resources.

That quote that we found supports that reason so that’s the evidence that you have. Who can explain that evidence for me? Why does that support the reason?

RASHAN: So they can use that land... to build stuff.

GABBY: And for more jobs.

MAYA: Alright very good. Are we good with this? Now Rashan just explained it for us. His explanation was this forest could be used for land to build...and develop on for U.S. interests. So you explained the quote now. You have a reason or topic sentence. Then you give your first piece of evidence. And then you explain your evidence. That makes sense, right? You say what your opinion is, you give a piece of evidence and then you explain the evidence.

(Field notes, 12/04/08)

After Maya helped students identify the first piece of evidence for reason #1, she had them identify a second piece of evidence for reason #1 independently. With time running short, Maya had them complete the next section of the outline for reason #2 for homework. Rather than have students finish the entire outline and essay for homework or during the next class period, she decided to move forward and administer the unit exam the following day.

As part of the exam, students had the option of writing a response to the inquiry question from the above lesson: “Why did the U.S. invade Cuba? Choose at least two reasons why the United States invaded Cuba. Please defend your argument [sic] by using quotes from the documents we read in class. (1-2 paragraphs)” (Document, 12/08/08).⁴⁴ Maya encouraged students to use their document charts and their partially completed outlines to cite evidence in their written responses, but she did not allow students to use the original documents as a reference. From a disciplinary perspective, Maya asked students to use historical evidence to support an argument in response to a prompt, which is a practice consistent with the discipline.

Teaching Historical Thinking: A Summary

Although Maya could articulate a discipline-based definition of history at the end of her teacher education program and did well in her methods courses, these ways of thinking about history did not necessarily translate into her daily instructional practices. Her instructional routine emphasized content knowledge and facts, and she incorporated historical thinking more sparingly in her practices. She used primary sources in some of

⁴⁴ Students had the option of responding to this inquiry question because they had to answer two of the three brief constructed response questions on the exam. This question was one of their three options.

her lessons, but she relied on them primarily as a means for students to learn content and practice reading comprehension. At times Maya included elements of historical thinking (e.g., sourcing and contextualization) in her teaching, but she did not always give students the opportunity to analyze documents and think about historical issues in-depth. Her overall focus on covering content in the curriculum overwhelmed her efforts to teach historical thinking.

Maya also struggled in her ability to create units that linked topics and historical themes within and across lessons. Many of her lessons, particularly in her World War II unit, covered three or more topics that were not connected. She jumped from one topic to the next without providing students a historical context or framework to organize their thinking. She seemed to move from one vocabulary term to another without considering bigger themes or ideas that could have been taught in the unit.

Although Maya struggled to teach historical thinking, it is important to recognize that she was a beginning teacher and still developing her instructional practices. Given that her teaching practices emphasized content knowledge and facts, she did engage students in some activities that had the potential to teach them how to think in more discipline-specific ways. Even though she used primary source documents to cover content and build comprehension skills, Maya also had students identify source information and evidence. She struggled to engage students in historical interpretation, but she integrated some primary source texts and activities (e.g., Spanish American War inquiry) that were important in building a foundation for historical thinking and interpretation. The following chapter compares Maya's teaching practices to Bryan's and Steve's, and it offers insight into their decision making.

Chapter 7: Developing Instructional Practices in Different Teaching Contexts

Steve, Bryan and Maya graduated from the same teacher education program that emphasized discipline-specific practices in history, yet they emerged as relatively different teachers in their first year of full-time teaching. Although all three teachers exhibited elements of historical thinking (e.g., teaching students to read and cite evidence) in their instruction, their implementation of these discipline-based practices varied. The following chapter compares the ways in which these three history teachers taught historical thinking, the strategies they used to facilitate historical thinking and areas for further development. The chapter concludes by analyzing why these differences may have emerged and more specifically how contextual factors may have influenced teacher development.

Teaching Historical Thinking: A Comparison of Teachers' Practices

Steve, Bryan and Maya presented history and ways of knowing in the discipline (i.e. historical thinking and interpretation) to their students in distinct ways. Steve began the year by introducing students to historical interpretation, and he emphasized the interpretive nature of history in the majority of his instructional activities. Many of his lessons reflected a discipline-based approach to historical study, and he consistently reminded his students that history is a process of constructing arguments and interpretations about the past. He told his students to “think like historians” and reminded them of the processes and strategies (e.g., sourcing) that historians use when they examine the past. This process of communicating the role of interpretation in history to students occurred repeatedly in his classroom.

In contrast, Bryan and Maya did not emphasize historical interpretation in their classes to bridge the gap between school history and disciplinary history. They did not directly challenge students' incoming ideas about history or explicitly discuss the role of interpretation in the discipline. Bryan focused on teaching students to read, comprehend and analyze evidence in historical accounts. He encouraged students to use quotations from sources to support their answers, but his questions were not often open to interpretation. With the exception of students' Spanish American War essays in which they argued a position and supported it with evidence, history assumed a more objective role; the key difference is that students' answers came from primary source documents rather than a textbook.

Similarly, Maya struggled to highlight the interpretive nature of history in her classroom. She acknowledged the importance of multiple perspectives and discussed her goal of incorporating more voices into her curriculum (e.g., including documents written by minorities during her World War II unit), but she often relied on the textbook and presented history as fixed information to be memorized in her class. Even when using resources from *Historical Thinking Matters* for her Spanish American War inquiry activity, Maya tended to emphasize content over interpretation.

Teaching students to read and analyze evidence. All three teachers incorporated historical documents in their instruction, but each used these texts in different ways. Steve and Bryan regularly used primary and secondary sources in their classrooms; students read documents, identified source information and completed document charts. However, what distinguished Steve's use of historical texts is that he had students routinely corroborate across accounts to construct arguments about the past.

Although Bryan did this during his Spanish American War inquiry lessons, he often used documents as a means to cover content in the curriculum and focused on comprehension rather than historical thinking. Maya differed from Bryan and Steve in that she used primary sources more sparingly in her class and relied instead on the textbook. However, similar to Bryan, with the exception of the Spanish American War inquiry, she focused primarily on students' reading comprehension and factual information when reading primary sources.

The teachers also differed in the extent to which they taught students to evaluate the reliability of historical accounts. Steve routinely had his students examine the source information: the type of document, when the document was written, who wrote the document and how the author's views influenced the message of the text. He led detailed class discussions about source reliability and the larger historical context, and he gave students specific instructions (e.g., include author and date) for citing evidence in written assignments. Bryan and Maya, on the other hand, were not as explicit about discussing source reliability with their students. Maya had students identify source information, but she did not discuss its importance, how it related to the message being communicated, or its reliability. Bryan discussed sourcing and contextualization in his Spanish American War inquiry, but he did not discuss these strategies in any detail during his World War II unit.

Instructional strategies that facilitated historical thinking. Each teacher incorporated a number of strategies to help students with their historical analysis. Even though the degree and quality of implementation varied, each teacher used student-

centered learning strategies, such as inquiry lessons, that allowed students to construct knowledge.

Steve routinely integrated inquiry lessons in his classroom activities. He always used a central question to guide student investigations and modified documents to aid student comprehension. This scaffolding process was key to helping students understand and analyze documents. Although Steve admitted to struggling when scaffolding student learning, he made significant improvements over the course of the year. He gradually planned more collaborative activities and guided students more in their analyses.

Although Bryan and Maya incorporated inquiry lessons more sparingly in their classes, they too used strategies to support students' historical thinking. Bryan, who used primary sources almost daily, modified documents (e.g., shortened them and revised some of the language) and created graphic organizers to guide students' reading and analysis. During the Spanish American War inquiry, both he and Maya had students respond to questions about the source and context of the documents, and they created outlines to guide students' responses to the inquiry question. Bryan's greatest strength, however, was his ability to scaffold student learning during small group discussion. He regularly had students working in teams, and he rotated among groups to facilitate their analysis of images and texts. Once students finished their group work, he guided whole class discussions in which they shared their findings. Maya, on the other hand, relied more on whole class lectures and teacher-led activities. She did not often work with individuals or small groups of students to scaffold their reading and analysis, and she did not provide many opportunities for students to share their thinking and ideas with others in the class.

Content coverage versus historical thinking. As first year teachers who were learning to teach in complex contexts, Steve, Bryan and Maya exhibited different levels of development in their ability to teach historical thinking. These teachers faced the challenge of trying to teach historical thinking within contexts that prioritized content coverage. Bryan, more so than Steve and Maya, faced additional coverage pressures because of the breadth of his district's high school U.S. history curriculum (which included twice as many units as Steve's middle school curriculum) and district-mandated end of unit assessments. To cover content, he had students read a number of primary and secondary sources about tested topics, but students did not have the opportunity to explore any one topic in depth. Because of Bryan's efforts to cover the curriculum and prepare students for unit exams, he also assigned students to read only one or two documents in each set (which might include six or eight documents about one topic) rather than read and corroborate multiple accounts. Bryan's strongest teaching emerged during his Spanish American War inquiry lesson when he focused solely on teaching historical thinking and provided students with the opportunity to construct evidence-based arguments.

Although Steve regularly engaged students in historical thinking, he too succumbed to pressures to cover content. When aiming to cover content outlined by the other 8th grade history teachers, Steve relied primarily on lectures and teacher-centered instruction and struggled to maintain his focus on historical thinking. This didactic teaching style often disengaged students (e.g., they put their heads on their desks, did not pay attention, and engaged in alternative activities) and gave them mixed messages about the nature of historical study.

To a greater extent Maya relied heavily on teacher-centered instruction in which she provided information to students, but her reliance on this type of instruction was mostly due to how much time she spent planning rather than pressures to cover content. Maya struggled to plan cohesive units of instruction that linked lessons and topics under an overarching theme or unit question because she did not spend a lot of time planning instruction in advance or outside of school hours. Her over-reliance on the textbook and on vocabulary provided students with limited opportunities to engage in historical analysis. Like Bryan, her strongest teaching appeared during her Spanish American War lessons when she used the *Historical Thinking Matters* inquiry activity. When she and Bryan had access to tools (or resources) that focused explicitly on historical thinking, they made a significant difference in the quality of their history instruction.

The Role of Context in Developing Practice

In analyzing these teachers' approaches to instruction, all three integrated aspects of historical thinking in their teaching, but the degree to which they routinely and effectively implemented discipline-based practices and provided scaffolds to develop students' historical thinking varied. Steve emerged as the teacher with the most developed practices that consistently emphasized historical thinking, while Bryan and Maya sometimes struggled to move beyond coverage of historical content. What explains these differences? Why did Steve make historical interpretation central to his teaching? Why did Bryan focus on historical thinking and interpretation in the first unit and then use primary sources as a means to cover content in the second unit? And why did Maya focus more on facts from the textbook and reading comprehension than historical thinking?

Throughout the observation and interview process, the role of context emerged as a critical factor in the development and decision making of these three novice teachers. The teacher education program provided teachers with an avenue to participate in a learning community where they regularly examined their practices with a focus on historical thinking. In this learning context, teachers developed their visions, beliefs, tools and understandings in support of practices that emphasized historical thinking. Once teachers graduated from the program, they found themselves in significantly different school and district contexts that no longer emphasized practices advocated by their teacher education program. Curriculum guides that emphasized historical facts and content coverage trumped in-depth inquiry processes and historical thinking. For Steve and Bryan, objective multiple choice assessments provided by the social studies department or district also influenced their instructional decisions. When working in school contexts that upheld goals that ran counter to those supported by their methods courses, teachers' decisions to teach historical thinking were dependent on the strength of other influential factors: these included their disciplinary understandings, their visions of ideal history teaching, their individual dispositions and commitment to teaching historical thinking, and the availability of tools and resources that emphasized disciplinary ways of thinking. The next part of this chapter examines the role that context played in teachers' development and how other factors mediated these contextual influences.

Teacher education and its influence on teachers' practices. Following each set of unit observations, Steve, Bryan and Maya completed a task in which they ranked the five most significant influences on their instructional practices (see Appendix F for ranking exercise), and each identified teacher education as important (see Appendix II for

teachers' complete rankings).⁴⁵ Teacher education, and more specifically the methods courses, influenced how each teacher thought about the discipline, the methods they used to teach historical thinking and how they scaffolded student learning. Although the teacher education program had a significant impact on teachers' instruction, the degree to which it influenced their practices varied.

Developing teachers' ideas about the discipline. The methods course sequence influenced how these three teachers understood history as a field of study. The initial summer course, which Steve and Bryan completed, was particularly important in challenging teachers' ideas about school history and introducing ways to integrate disciplinary modes of knowing (i.e. historical interpretation) in the classroom. In a weekly reflection Steve wrote, "My views of social studies education have been problematized for me in the best of ways, as the class has forced me to reflect on and reconsider my preconceived notions" (Document, 07/09/07). Steve credited the summer course with challenging his incoming ideas about teaching history and helping him realize that he could minimize the gap between traditional school practices and disciplinary history. He said:

Personally I always understood the notion of looking at history from multiple perspectives. That didn't come as a shock to me, but I think part of me really doubted how that could be used in the classroom to its full extent. So I think the thing I took away most was... realizing that it can be used in the classroom no matter what you are teaching... In a way it was reassuring because it was really

⁴⁵ Even though Bryan did not identify teacher education in his top 5 influences after his World War II unit, observation data revealed he integrated ideas and strategies from his methods courses regularly. Also, when teachers identified teacher education, they referred specifically to their methods courses.

helping me realize that disciplinary history and classroom history don't necessarily have to be two different worlds. (Interview, 08/04/07)

Bryan expressed a similar appreciation for the summer course. Since he had a background in government and communications and was making a career switch, his knowledge of history and how to teach it to students was rather limited. During an interview at the completion of his summer courses, he reflected on his learning in the first methods class:

Learning the historical inquiry... I absolutely loved that because one of the things that always frustrated me about social studies teachers was that boring lecture. I do not want to be a teacher like that, and I said that before I walked into this program, but I said I don't know how to counter that. So I got the *History Lessons*⁴⁶ book in the mail... and I started reading about George Blair and Linda Strait... George Blair is the professor I had... but Linda Strait was the kind of a person I would love to be. I am far from that, but I think that just that methodology helps so much in giving you a rudder for your sail. I mean it just really helps with that perspective because it makes sense and it reinforces those key things that are required by the state, but yet gives you the flexibility to do it in way that really helps demonstrate what history truly is. Do it with documents that are historical as opposed to a McGraw Hill (textbook). (Interview, 08/04/07)

Entering the program, Bryan knew that he did not want to use lectures as a means of transmitting facts to students, but he did not have the knowledge necessary for designing

⁴⁶ Bryan referenced S.G. Grant's book, *History Lessons: Teaching, learning, and testing in U.S. history classrooms*. In this book, Grant provides cases of two teachers, George Blair and Linda Strait, and compares George's storyteller or knowledge transmitter approach to Linda's more student-centered teaching methods that facilitate knowledge growth in the classroom.

instruction that engaged students in activities that aligned with the discipline. The summer methods class and accompanying readings introduced Bryan to historical inquiry and helped him discover the importance of using a student-centered approach and incorporating primary sources in his teaching.

During their internship and first year of teaching, Bryan and Steve often referred to readings, discussions and class activities from the summer methods course. It was evident through observations and conversations that this introductory class had a significant impact in how they thought about the discipline and teaching history. Although Maya did not complete this particular course, she did credit her fall and spring methods classes with providing her with a new way to think about history. Since she only completed two of the three history-specific methods courses,⁴⁷ this may have partially contributed to her less developed teaching practices.

Developing strategies for teaching historical thinking. The fall and spring methods courses, which all three teachers completed, provided them with specific strategies or tools for teaching historical thinking. The fall course introduced teachers to specific reading and writing strategies, such as sourcing, contextualization and evidence-based thinking. The instructor outlined example lessons for teaching students how to analyze the source and context of historical documents. Steve, Bryan and Maya then had to design their own lessons that introduced students to one of these reading strategies and implement the lesson in their field placement.

Although all three teachers did not implement these exact lessons in their first year of full-time teaching (due to grade level and content area changes), these ideas about

⁴⁷ As previously mentioned Maya took a general social studies methods course (that did not emphasize historical thinking) as an undergraduate and joined the Masters cohort in the fall following her graduation.

how to teach historical reading remained part of their teaching repertoire. All three teachers regularly had students identify information about the source and context. When students read historical documents, they completed charts in which they identified the author of the text and date when it was written. Steve explicitly modeled the process of reading historical texts for his students, and they regularly had discussions about analyzing source reliability in his class. Although not as routine, during the Spanish American War inquiry lessons, Bryan and Maya had students answer questions about the source and context after reading each assigned document. Even though Bryan and Maya were still developing in how they taught historical thinking, they both relied on concepts and strategies learned in the methods courses.

In addition to historical reading strategies, these teachers also relied on specific lesson plans and resources that had been introduced in their methods courses. Bryan and Maya decided to use the Spanish American War inquiry lesson from the *Historical Thinking Matters* website, which had been shared in teacher education. Maya explained her reasoning in deciding to teach this topic using this particular set of lessons:

I knew I wanted to start using some of those historical thinking skills type of things, and I actually did this [lesson] last year too right when (our instructor) was teaching us about this stuff. As soon as she did this with us in our [methods] class last year, even though I was new at it, I tried it out [in my internship]. I already have all this stuff that I did last year so I'm going to do it again.

(Interview, 12/12/08)

Similarly, Steve used the Boston Massacre activity as an introduction to historical thinking in his 8th grade class because the summer instructor had used it with the teacher candidates. Steve reflected on why he chose to incorporate this lesson:

It's such an interesting topic to use for getting them to provide their own perspective on what happened. So it was great. It was one of the ones that I was introduced to in grad school classes. I just think it's a perfect, engaging introduction to the type of thinking historians do. I wanted to use it as opportunity to get them to think at that level, get introduced to it at least, and start thinking about history as more than simple facts. (Interview, 10/28/08)

Although implemented to different extents, all three teachers used tools (both conceptual and practical) that had been introduced in teacher education. The simple act of selecting and modifying primary source documents for instruction had been carefully modeled in the fall methods course. All three teachers used at least one inquiry lesson, which they had learned in the fall methods course, during unit observations. Steve regularly implemented this lesson format in his U.S. history class as he frequently had students read and analyze multiple documents, complete document charts and write evidence-based arguments. Bryan also incorporated discussion-based lessons, such as Socratic seminars, which had been introduced and modeled for teachers in the fall methods course.

In addition to specific lesson templates or practical tools for instruction, the methods courses provided teachers with conceptual tools for thinking about student learning and making content accessible to them through scaffolding. These tools included modifying primary source documents, creating graphic organizers, modeling reading

strategies and providing students with outlines to organize their historical writing. Bryan and Maya consistently reported that making content accessible to their students was at the forefront of their instructional decisions (see Appendix II for rankings). Bryan shared the important role that teacher education played in helping adapt his instruction: “I spend so much of my time thinking, ‘How do I adapt this content to make it relevant for my kids?’ I spend a lot of time doing that and that’s where I refer back to that cheat sheet [a summary handout of strategies from teacher education for making content accessible to students]” (Interview, 12/02/08). Steve similarly identified this as a significant influence on his teaching:

I think especially with all the work we put into discussing different ways to do this type of historical analysis with students, making it accessible to students is really important and is something I still rely on now. That’s the most important thing from the teacher ed courses that is beneficial. (Interview, 10/28/08)

The fall methods instructor made scaffolding student learning central to the goals of her course. On the third night of class, she introduced the idea of scaffolding after the teachers had read articles about equity and access in classrooms and how students learn history. She told the teachers that it was up to them to give students access to these types of thinking and reading strategies and to direct students’ attention to important aspects of historical texts. When breaking down documents for students, they needed to ask themselves two important questions: “What are the essential parts? What in the document will help students understand [the goal of the lesson]?” (Field notes, 09/18/07). The instructor guided the teachers in identifying important ideas that they wanted students to learn from the text and in making content accessible by modifying texts, using questions

to focus students' attention on specific ideas in a text, and using graphic organizers to help students organize their thinking. All three teachers routinely used these strategies when students read primary sources in their classes.

The impact of teacher education. Although some research (e.g., Kennedy, 1999; Zeichner & Gore, 1990) claims that teacher education has a relatively weak impact on teachers' practices, this study shows that teacher education can have a moderate to significant impact depending on a number of other interrelated factors. The duration of the program was not long enough to completely change teachers' ideas and understandings about teaching history, but each teacher relied to some extent on strategies and resources that had been introduced in teacher education. The methods courses continually engaged teachers in discipline-based practices and developed their knowledge of how to make historical thinking strategies accessible to students. Through various activities and assignments (e.g., case study of student learning and reflections on implementation of lesson or unit plans), teachers regularly analyzed their students' learning and reflected on how their teaching practices facilitated or did not facilitate historical thinking. In this learning context, teachers had the opportunity to take an "inquiry stance" (Cochran-Smith & Lytle, 1999) towards their teaching. Unfortunately, this supportive context did not extend into Steve, Bryan and Maya's first year of teaching.

Finding the right level of support: examining the role of the school and district in supporting practices that promote historical thinking. Teachers' implementation of disciplinary practices was often mediated by school and district contexts that did not adequately support teachers' reform-minded instruction. Steve and

Bryan ranked their district curriculum (and assessments) and their social studies departments as having a significant influence on their teaching practices (see Appendix II for complete rankings). They faced the challenge of working in tightly controlled environments that mandated curriculum and assessment choices. On the other hand, Maya faced the challenge of working in a district and school context that provided her with limited support. Whether working in a context controlled by the top-down or in one that took a hands-off approach, these teachers faced the same challenge of finding the right levels of support to teach historical thinking.

Curriculum frameworks and tools for teaching: making decisions about content and whose history to teach. During unit observations, all three teachers adhered to district curriculum frameworks and pacing guides when planning instruction. None of the teachers challenged or infused new content into the county curriculum. Steve commented, “Everything I do has to fit into that framework or I don’t do it” (Interview, 04/01/09). In addition to the county curriculum, Steve’s teaching team provided him with daily objectives, which he, in turn, used to plan his lessons. When asked if he added or deleted content to the team objectives, Steve said:

I am really restricted in what content-wise I can do and as a team that’s where we have to be on the same page with one another. We have content goals that are pretty much the same. The style and delivery of instruction can change, but especially at this school... there’s not a lot of room for me to infuse a lot of new content... I don’t delete because I’m too afraid to delete. I’ll be honest. I try to be by the book the way they try to do things...I might de-emphasize certain things, emphasize certain things, so just depending on what I feel is most important

fitting in my own framework and also where my kids are and what they're understanding or not understanding. (Interview, 09/19/08)

Even though Steve had some flexibility with *how* he could teach, he believed the “what” had to align with his team’s objectives. Despite not adding or deleting content in the curriculum, he chose to emphasize certain topics over others. He took into account his own goals and ideas for the unit as well as how students progressed in meeting those learning goals. For example, he spent four days on the War with Mexico inquiry whereas other teachers only allotted one day to discussing the conflict.

Similarly, Bryan and Maya followed the curriculum when deciding what to teach. Maya repeatedly said that she based her topic selection and chronology of lessons on how the county curriculum guide outlined the content.

I follow the basic curriculum to make sure that I’m just on track... I mostly stick with the standards... For me it’s important because when people come in to observe me they need to know I’m on the pacing guide and that I’m meeting certain standards. (Interview, 11/17/08)

Even though Maya’s social studies department did not mandate daily learning objectives or require that she follow a strict curriculum, she still reported feeling pressure to conform to the district’s pacing guide.

Bryan also felt pressured to follow the curriculum as outlined by the county. He shared that during his internship year at Johnson High School he wanted to engage the students in an inquiry activity about the Holocaust during his World War II unit. When Bryan asked for permission to implement the inquiry lesson, the department chair

rejected his idea. Because the county had designated the study of the Holocaust as part of the world history curriculum, Bryan could not address it in his World War II unit.

In addition to the actual content covered in the curriculum, the way the curriculum was structured and the lessons it outlined provided teachers with different tools and teaching resources. Carrolton County Public Schools, where Steve and Bryan taught, included detailed daily lessons and linked these lessons with overarching questions for the unit. At times the curriculum included excerpts from primary source documents and graphic organizers for students. In contrast, Westfield County's curriculum listed daily objectives, pages from the textbook that corresponded to the day's topic, and example constructed response questions, but it did not provide detailed lessons or units presented in a cohesive whole. Their curriculum was organized chronologically but not thematically. This might help explain why Steve and Bryan's lessons were linked together in a cohesive unit while Maya's lessons seemed choppy and did not connect in a meaningful way. Although the length of a district's curriculum should not be equated with quality, in this case there was a correlation. An average CCPS unit included between 100 and 200 pages, whereas the entire WCPS curriculum for the year totaled less than 200 pages. As a first year teacher, Carrolton County's in-depth guide provided a baseline of ideas and resources. Unfortunately, it became problematic when those ideas were mandated rather than treated as one tool or resource to choose from.

There's never enough time! How content coverage trumps historical thinking.

Steve and Bryan experienced pressures from the district and their respective social studies departments to cover specific content in a limited amount of time. Bryan faced a content-heavy high school curriculum that encompassed eight units of instruction

spanning topics in U.S. history from Reconstruction to the present. He regularly expressed his frustrations when facing pressures to teach content in a limited amount of time: “I just feel like we’re trying to cram in so much information in such a short amount of time...I never thought this would be such an issue” (Interview, 03/24/09). Following his World War II unit, Bryan identified time constraints as the most significant factor affecting his instructional planning and decision making.

Steve’s middle school curriculum included four larger units of instruction spanning the Revolutionary period to the Civil War. Although the curriculum included fewer units than the high school framework, Steve felt pressured to cover its content in addition to his U.S. history team’s objectives, which often differed from the county’s curriculum framework. Additionally, his 8th grade U.S. history classes met for only 45 minutes each day, and this schedule presented “a huge hurdle” for planning instruction and engaging students in in-depth historical analysis. When asked about the challenges he faced in planning and teaching, Steve identified his continued struggles as time to teach the unit, curricular pressures and the schedule. He reflected on the challenge of meeting coverage demands and how it impacted his instruction:

I feel like I have to keep moving based on the team and everyone is supposed to be on a similar schedule and not get too far behind... And usually I will get behind rather than cut out important stuff, but it doesn’t give me as much time as I would like to go back and reassess, to re-teach, to re-focus on certain things. So it can be a burden. (Interview, 10/28/08)

These pressures to cover content influenced Steve and Bryan’s daily instructional decisions. For example, at the end of Steve’s inquiry lesson on the Trail of Tears, he

planned to have students argue whether Native American removal policy was a triumph or failure of American democracy. The activity asked students to write from one of four perspectives (e.g., Cherokee Native American or President Jackson) and use evidence from six documents to support their positions. Because Steve did not think he had time to extend the assignment to another day, he rushed students through reading the documents and did not have them complete the writing activity. At the end of the unit, Steve mentioned that he wished he had taken the time to discuss the documents in more detail, to clarify students' misconceptions and to give students time to write a response to the inquiry question.

Similarly, Bryan's instructional methods were often affected by time constraints. During the two observed units, he never had students read and analyze a complete set of historical texts. Rather, he relied on the "jigsaw" method in which students read one or two documents and then shared information from the text with the rest of the class. This method prevented students from corroborating across documents, which is an important step in understanding multiple perspectives and the historical context.

Time also influenced how Bryan and Steve structured written assignments. Neither teacher had students write multiple drafts of an argument or revise their writing. Without opportunities for revision, students were not able to improve the quality and strength of their arguments after their initial drafts. Following the Spanish American War inquiry, Bryan mentioned that the original source of the activity, the *Historical Thinking Matters* website, intended for students to spend more time crafting an argument, but he simply didn't have the time: "They wanted you to spend more time on drafting it and

owning it, and I didn't have that kind of time to spend on it. I felt like I was already cramped for time as it was" (Interview, 10/28/08).

The standardization of assessments: how district and department exams limit opportunities for historical thinking. Coupled with time constraints, district and department-wide assessments greatly impacted Bryan and Steve's instructional practices. CCPS standardized unit exams for all high school U.S. history classes. Bryan's school took standardization one step further by implementing a policy that required all social studies teachers to use identical summative assessments: teachers were not allowed to add to or delete prescribed assessments. To complement the county unit exam, the U.S history team created one additional assessment (e.g., timeline or short essay) to be administered to students at the end of each unit. These assessments were designed to off-set the multiple choice exams, but they too measured mastery of factual historical knowledge. Although Bryan could have designed an alternative end of unit assessment and instead officially counted it as "formative," he found it difficult to squeeze them in when students had to complete two other mandated assessments.

Bryan often found himself teaching to the test. He described how he used the district curriculum and unit exam in his planning process:

So first thing I do is kind of read through the curriculum, just kind of an overview. What is it I'm trying to cover in the unit? And what are the important aspects? And then, with that, after reading through it, I will look at the test. You know begin with the end in mind, right? So I'll look at the assessment. What is it that I absolutely, positively have to cover in some level of detail so that they can do well on the test and speak coherently or write coherently with detail and evidence

for a BCR [brief constructed response]?... Then I look at okay, how much time do I have based on where I have to back-map, the starting date versus when I need to be testing, that testing window? And then what topics can I cover during that time? (Interview, 11/03/08)

Bryan's department chair determined a testing window (approximately a three-day period) for each unit of instruction. Based on the content on the exam and the administration date, Bryan planned his unit given how much time he had. Bryan openly expressed his disdain for district assessments and referred to them as a "pain." During an interview he voiced his frustrations about having students answer multiple choice questions as part of their daily warm-up to prepare for the exam: "Do you think I go through this fiery hoop of warm-ups everyday just for kicks?" (Interview, 03/24/09)

The district assessment also determined the content that Bryan focused on in class. For example, during his World War II unit, he devoted more than two days of instruction to discussing United States war strategies. He explained his decision making:

Ultimately in terms of how they are tested—unfortunately on this unit—CCPS wants them to know the four strategies the U.S. had for winning this war. That was the purpose for why I even covered it. To me it's not a very sexy topic to be covering in class, and there's not a lot of meat to it. So that's why it's one of those kind of have-to-cover subjects as part of the curriculum. (Interview, 03/24/09)

When asked how he would make changes, if any, to those lessons or others in the future, Bryan retorted:

I would throw it out... I mean if I had no testing requirement, I would throw out that portion because I would focus on, okay what are the keys to winning the war

which is important. But in terms of going into the Battle of the Coral Sea, I mean realistically who has a conversation over drinks about that? ... My focus isn't on those battles and on those wars; it's on bigger picture kind of stuff... So many of the hoops I jump through are because of that stupid test! (Interview, 03/24/09)

Bryan recognized that studying individual battles had no relevance for his students. The only reason he included them in the unit is because the county asked specific questions about U.S. war strategy on the exam. Since his students had to take the CCPS unit exam and he was required to count it as a certain percentage in his students' grades, he thought he had no choice but to include the war strategy content in his unit.

Steve faced a similar challenge in that his U.S. history team teachers provided him with chapter tests that he had to administer to his students. Although CCPS did not mandate unit assessments at the middle school level, they administered semester exams, which also influenced Steve's planning and decision making.

When I was trying to focus on the big enduring understanding of the essential question for the unit I'm doing, I wanted to make sure what I chose tied into the CCPS focus for the unit because it's really important to stick to the way the curriculum is geared and what the focus is because...in 8th grade we have a mid-term and final and it will be closely aligned with the CCPS vision.

(Interview, 09/19/08)

In addition to making sure he prepared students for the CCPS midterm and final, Steve had to prepare students for his team-provided chapter tests. Steve slightly modified the exams, but he was not comfortable making significant revisions:

I didn't modify it much. I added a few questions, changed the wording of a couple questions I thought were confusing. With the textbook test I feel like they sometimes emphasize really weird things. That the only way you would be able to answer it correctly is if you read the textbook so in-depth and so perfectly that you understood everything on those pages and some of questions are just pointless. I can't even remember some of the examples of things that were in here. But I took some of them out and replaced them with things that I emphasized, but I kept most of it. Part of me was a little afraid to venture too far from what the team was doing because they kind of handed it to me, said take this, modify it how you want, but it was kind of said in a way that 'don't modify it too much' was what they really meant to say. (Interview, 10/28/08)

Steve recognized the difficulty and irrelevance of the test questions that emphasized random factoids from the textbook, but as a new teacher, he did not think that he could make considerable changes to the assessment. Even though he had to prepare his students for team assessments, Steve tried to balance these with activities (e.g., War with Mexico letter to the editor) that prioritized historical thinking.

Overall, district and team-provided assessments had a significant influence on Steve and Bryan's practices. In contrast, even though Maya had to administer a district-wide quarterly assessment, her district and social studies department did not pressure her to assess her students in any particular way during or at the end of units. She opted to use more traditional assessments and to teach in a more traditional way, but her choices were not primarily due to contextual pressures.

Isolating school cultures and the challenge of reform. Steve, Bryan and Maya worked in district and school contexts that failed to provide them with sufficient professional supports to develop and improve their practices. They worked in isolation when it came to designing instruction that aimed to help students learn to think historically. In contrast to their teacher education experience, they did not participate with colleagues in a community devoted to inquiring about and improving practice.

Although each teacher belonged to a social studies department and/or U.S. history teaching team, these groups focused on peripheral aspects of teaching (e.g., pacing, testing dates) rather than core issues of teaching and learning in the discipline. Teams and departments did not meet often (on average once a month) and when they did, their agenda consisted of primarily administrative issues. Bryan summarized one of his U.S. team meetings:

When I walked into the meeting on Friday for U.S., they basically said, “Okay first item on agenda, the U.S. test window for unit 3 is December 5th and 6th. Guidance is going to be coming into your classroom the week of November 17th. They need some time out of your class period to talk about schedules.” ... And then they said, “We’re giving a midterm the week of Thanksgiving so you’re going to need some time to review for that... print out a report of class grades and meeting’s over.” And that’s literally how fast it went...maybe five minutes. There’s not a whole lot of brain think going on. (Interview, 11/03/08)

Maya did not belong to a U.S. history teaching team. When her department met, the only instructional item they discussed pertained to the quarterly assessment. She said, “We talk about administrative issues, textbooks, signing in stuff...and other small little

announcements” (Interview, 11/17/08). When asked if she planned with colleagues, Maya shared that she planned independently. Teachers at North Park High School did not often share ideas about instruction or student learning, and Maya indicated that she did not have knowledge of her colleagues’ practices.

Steve’s U.S. teaching team met weekly, but unfortunately he was unable to attend any of their meetings. Rather than select a time when all teachers could meet (e.g., during lunch or before or after school), the other U.S. history teachers decided to meet during 4th period when Steve had to teach. His inability to be involved in team meetings and planning was frustrating because the other teachers made important decisions about daily learning objectives and assessments. He had no voice in the conversation yet he was expected to follow their lead:

It’s tough to not be involved in the planning process and still be expected to do things they are doing. I almost feel like now it’s time for me to either find some way to get more involved in team planning or just go off on my own and formulate my own ideas for the unit so I don’t know. I don’t know what my options are. It’s a stressful thing for me at this point in my teaching career.

(Interview, 10/28/08)

Eventually, Steve found ways to prioritize historical thinking and also meet his team’s expectations even though they never accommodated his schedule so that he could participate in weekly meetings.

All three teachers worked in departments characterized by a culture of isolation. Teachers worked independently and without the support of colleagues who also aimed to teach historical thinking. All three teachers described their departments as not being

collaborative. Maya's interactions with colleagues were limited to them observing to see she was "on the right track" with pacing guidelines. Her department chair was a resource to "get paper" or if "you need help with opening the door" (Interview, 11/17/08), but they did not work together to analyze best practices in history instruction.

Similarly, when Bryan was asked if anyone at his school had helped him prepare for his first year of teaching, he laughed and said "not really" (Interview, 11/03/08). He shared his frustration with colleagues' lack of communication and collaboration: "We have a folder where we share best practices, but it's basically stuff that I use and put up there... Not to sound egotistical but I mean there's not a whole lot of sharing going on" (Interview, 11/03/08). By the second semester, he had a much more negative reaction when he described the culture of his department:

Evolving. Still very artificial. You have to watch your back. You don't know who to trust a lot of times. You don't know what you say that could be construed and turned into something that gets to somebody who shouldn't be hearing what you're saying. I try and stay out of there [the teachers' lounge]... It's very bitter in there which is why I stay away from it. I would rather be spending my lunch hour with kids helping them improve their grades. (Interview, 03/24/09)

Bryan felt isolated and alone as a first year teacher. Teachers did not collaborate and they definitely did not share a common goal of continuous improvement.

In these particular school contexts, Steve, Bryan and Maya did not see models of teaching that mirrored practices emphasized in teacher education. Their colleagues did not share visions of practice that encompassed disciplinary modes of knowing such as historical thinking. This dichotomy between methods emphasized in teacher education

and practices seen in schools presented a challenge for teachers. Steve and Bryan had to learn to teach historical thinking without the support of colleagues while balancing their goals with those of their departments and district. Although Maya did not experience the same pressures of standardization from her school or district, she used more traditional teaching practices when left without the support of a teaching community that valued reform-based teaching methods. How was Steve able to maintain a focus on historical thinking? Why did Bryan continue to have students read and analyze primary sources given his mandated multiple choice assessments? And why did Maya rely on more traditional practices despite not working in a tightly constrained environment? The ways in which these teachers responded to their teaching contexts were often mediated by other factors, such as their disciplinary understandings, visions of ideal practice and individual dispositions.

Mediating Contextual Influences: The Role of Teachers' Understandings, Visions and Dispositions in Teaching Historical Thinking

Teacher education and the school and district context had a significant influence on how teachers learned to teach historical thinking and their decision making in the classroom. However, a number of other factors also contributed to teachers' development and instructional decisions. Each teacher entered the teacher education program with different backgrounds and varying levels of disciplinary understandings. These understandings matured during the program and undoubtedly shaped their visions of practice in their first year of teaching. Teachers' dispositions, including their work ethic and tendency to reflect on practice, also influenced how they enacted instruction.

Teachers' disciplinary understandings and the development of a vision of

practice. Steve, Bryan and Maya entered the teacher education program with different educational backgrounds, which influenced how they defined history and how their understandings developed during the program. Steve majored in history and had participated in National History Day as a middle and high school student. He had a strong understanding of the interpretative nature of history and this understanding continued to develop during the program as he learned to make these ways of knowing accessible to his students. Bryan majored in government and communications and entered the program as a career change after having worked in those fields for a number of years. Maya, too, came in with a major in government so these ways of thinking in history were new to both her and Bryan.

Although Maya and Bryan entered the program with limited understandings of the discipline, throughout the year they developed their disciplinary knowledge, which then helped them focus on aspects of historical thinking in their first year of teaching. Table 7 compares how all three teachers defined history at the beginning and end of teacher education. Whereas Steve was the only teacher to enter the program with an understanding of the interpretative nature of history, all three teachers could articulate the importance of multiple perspectives and evidence in history at the end of the program.

Table 7

Defining History

	How Defined History upon Entering Teacher Education	How Defined History at end of Teacher Education
Steve	To me, history involves patterns and themes from the past as well as the lessons that the past offers as insight into the present. It involves the interpretation of past events.	History is not synonymous with the past. To call history the past implies that it is stagnant and unchanging. Instead, history involves the study of the past and interpretive accounts of past events that are illuminated by careful examination of historical evidence. History is always open to change according to present circumstances. History is constructed, molded, crafted by careful analysis of the evidence at hand.
Bryan	History is the study of past events that have shaped our lives. It is the review of actions and activities that have had a positive or negative impact on events that shaped the activities and impact of future events. One history teacher I had used to say, “the past continues” and understanding this context helps us better understand current events, activities, and situations.	While Rush Limbaugh would say “It’s what happened” [excerpt from methods class], we know that history is the weaving of events, people and circumstances that reveal the actions of a time and the effects of those actions on future events. But the perspectives of those events are told in varying ways, through the selection of sources that we use to help give insight, perspective, and context to the actions that are recorded of people and how they impact the lives, actions and events in the future.
Maya	History is oral or written communication of past events that is fact or fiction based on each person’s perspective.	History is an account of the past that can be interpreted through multiple perspectives. It is not merely a book of facts, it requires analyzing the past using primary and secondary sources using the skills of sourcing, contextualizing, and corroborating to make claims about how, what and why events and ideas occurred and existed.

Perhaps because Steve entered the program with these well-developed understandings, he was able to translate his understandings into practices that engaged students in historical inquiry. Maya and Bryan made significant strides in developing their own knowledge during teacher education, but they did not have the same level of expertise to easily translate these ways of thinking into classroom inquiry activities that mirrored how historians construct history. Upon entering the teacher education program, Steve was cognizant of the gap between school and disciplinary history and made an effort to minimize that gap in his teaching practices. On the other hand, Bryan and Maya translated their understandings into smaller instructional goals, such as incorporating historical documents in the classroom. It was an important first step in engaging students in historical thinking, but they will need to continue to develop their practices so that students go from analyzing single texts to regularly analyzing and corroborating across multiple sources to form an argument about the past. Finally, Maya missed the first discipline-based methods course, which highlighted history as interpretation and the possibility of teaching it that way, and this may have affected her ability to translate ideas from the program into practice.

Teachers' understandings played a role in shaping their ideal visions of history instruction. These visions in turn influenced how teachers approached instruction in their first year of teaching. Steve's vision mirrored his understanding of history as a constructed discipline. He wanted students to provide their own interpretations using historical investigations in his classroom:

My big vision is I want to emphasize the fact that history isn't set in stone and to encourage my students to understand and to participate and actually provide their

own interpretations for history. And the phrase that's a good one to use is I'm trying to get them to be history-makers instead of history memorizers...we're going to start by, how do you first of all, what is the difference between primary and secondary sources? How do we know history? How do historians and other people write about history? What do they use? Getting them to understand that. Then moving into and building into more in-depth historical analysis skills.

(Interview, 09/19/08)

Bryan shared a slightly different vision that emphasized aspects of evidence-based thinking, but he did not specifically articulate a vision that prioritized historical inquiry. When asked about his ideal vision for teaching history, he said, "I'm trying to get them [students] focused on two things. One is getting them to pull evidence out of material, whether that's primary sources or other readings, and then also to write about that [to use evidence in their writing]" (Interview, 11-03-08). When asked about pedagogical methods, he explained his vision to use lots of group work and "jigsaw" activities when reading primary sources. While observing Bryan's two units of instruction, it was evident that he remained true to his vision of practice.

Maya's vision also emphasized characteristics of historical thinking, but she too did not share a vision as developed as Steve's when it came to involving students in historical investigations and constructing interpretations of the past. During an interview at the conclusion of her teacher education program, she identified sourcing and understanding multiple perspectives as two important aspects of her vision of practice. She shared, "I feel a lot of students read things... and don't understand who wrote it and why they wrote it and just take it for what it is, take it for fact... I want them to learn

history is not set in stone... It's a matter of perspective" (Interview, 06/11/08). Similar to Bryan, Maya did not specifically mention a goal of engaging students in historical analysis or having them construct arguments about the past using evidence. These differences in vision help shed light on why these teachers' practices differed in the extent to which they taught historical thinking in their first year of teaching.

The role of teachers' dispositions in the development of practice. When comparing how Steve, Bryan and Maya approached their teaching, it became apparent that their dispositions played an integral role in shaping who they were as educators. Steve's love for history and ability to reflect upon and adapt his teaching enabled him to teach historical thinking within a challenging school context. Bryan and Maya's dispositions, which sharply contrasted with one another, mediated if and how they implemented strategies learned in the teacher education program and how they approached their teaching practices within their unique working contexts.

When Steve applied to the teacher education program, he revealed that he wanted to be a history teacher so he could share his love of the discipline with students and inspire them to have a similar passion for the subject. Steve had participated in National History Day as a middle and high school student so he had experience creating historical documentaries and hoped to eventually involve his own students in this process of conducting historical research. His enthusiasm for teaching students the art of historical interpretation was evident during classroom observations when he encouraged students to imagine that they were historians and had to sift through evidence to form their own conclusions.

Second and perhaps more important was Steve's ability to reflect on his teaching practices and what he could do to facilitate student learning. Steve shared that his greatest challenge was "anticipating when students are going to be confused, what they are going to be confused with, and knowing how to address it" (Interview, 04/01/09). Despite Steve's struggles to anticipate student misunderstandings and scaffold their learning, he showed signs of being an "adaptive expert" (Darling-Hammond & Bransford, 2005) in that he reflected on his teaching and made plans for how he could revise his instruction. During a post-unit interview, Steve reflected on how he could have better guided students in their reading and analysis of documents during the War with Mexico inquiry: "It probably would have been better to have a whole class discussion of these to some extent because there are some really abstract ideas in some of these that I wanted them to see" (Interview, 04/01/09). When asked to discuss why his students struggled, Steve considered weaknesses in his teaching rather than deficiencies in his students:

I think it all goes back to me...I don't think I reinforced it enough and it's the idea of when you are reading these types of things [documents], it's not like reading a textbook...where it's easy to read...and answer this question...They've been trained...to do that type of reading where they look for evidence from the text and they are getting evidence from the text. It's just that they are misinterpreting the evidence because they aren't thinking about the document and its place and context. Again it's hard for me to say that what they did was a bad thing. It's just kind of a lack on my part of really scaffolding this idea and reinforcing this idea of how we look at these types of sources and how we think about what they're saying and what they're doing at the same time. (Interview, 04/01/09)

If Steve were to use this inquiry activity again in the future, he might make revisions based on this reflective process.

Bryan shared this same tendency to reflect on his teaching practices and how he could make improvements. He identified being a reflective practitioner as his greatest strength: “I reflect a lot. I really take into consideration what my students are learning or not learning in order to adapt my teaching” (Interview, 06/12/08). It was not uncommon for Bryan to stop me in the hallway to chat about his teaching, to share his struggles and to reflect on ways he could improve his practices. He critically evaluated each lesson he taught and every decision he made, from cutting down primary source documents to approaching inquiry lessons differently.

A second disposition that influenced Bryan’s teaching was his work ethic and commitment to teaching. His university supervisor compared Bryan to a sponge, soaking up every bit of feedback or advice given to him. He taught four different courses in his first year, sacrificed his lunch break to provide additional support to students and worked extremely long hours (it was not uncommon to receive an email from him at 2:00 a.m.). He preferred to research his own classroom materials rather than rely on district-provided ones, but this also took a lot of time and effort that novice teachers do not have (Martin & Monte-Sano, 2007). He described himself as a “workaholic,” and although he took pride in his efforts to continuously revise and improve his teaching, he also recognized that it was one of his weaknesses.

I feel like I’m a very...for lack of a better word, a very studied teacher. I really take that seriously. I do a lot of research in coming up with almost to the death by sources model, but not that I give that to them because I’ve learned to scale that

back, but in terms of just really I want to make sure that what I'm giving them is the best I can find right now, the best adaptation that I can do. And that I can go back to that based on what I've learned from what went well and what didn't and adapt it again based on what did or didn't work... So being flexible and adaptable to be able to change my teaching in order to help them learn it better is probably my strength. I think it's also my weakness... because I think that I probably drive myself nuts doing that and I do that so often that I'm probably killing myself.

(Interview, 06/12/08)

Bryan put significant effort into his teaching and constantly modified his instruction from one period to the next. Despite these efforts, Bryan was his "worst critic" and never felt confident in what he was doing. As a first year teacher, he needed to accept that he was a beginner and even though not perfect, his practices would continue to develop and improve as he gained more experience.

Maya's dispositions sharply contrasted with Bryan's, and perhaps explain the differences in how they planned and implemented instruction. During Maya's teacher education year, she had a paid internship, which meant that she planned and taught three social studies classes from day one in an extremely challenging and often unsupportive school context. This paired with being a full-time graduate student made it a particularly difficult year for her. At one point in the fall, she had considered quitting, but with support from the university, she managed to finish the year and program. The level of stress she experienced no doubt had an impact on how she approached her first year of teaching. When asked how her internship year influenced her first year, Maya explained:

Last year just helped me to be a lot more relaxed [this year]. I learned I couldn't be perfect at everything. I tried so hard to be perfect and it made me break down. Whereas this year I know that I can't be perfect... that's why this year [my stress level] is not at a 10 because I go home. I wish I did something differently. I wish I planned it, but I'm not crying. Alright whatever. Tomorrow I'm going to try something else. I can't get myself to that point again. (Interview, 03/11/09)

Maya did not want to experience the stress that she had encountered in her internship year. To prevent feeling overwhelmed, Maya went home at the end of the day rather than stay late to plan. During pre-unit interviews (which occurred a day or two before the unit began), Maya had trouble articulating her goals and activities for the unit because she had yet to plan them. It was a common occurrence to see her type last minute notes on PowerPoint slides minutes before sharing them with students. Maya knew her lack of planning was an issue of motivation and time rather than ability:

It seems like I should have this together by now, but once you get to the unit it's so hard to sit there and try to get everything to mesh together. I guess it's not hard you just have to have motivation to have time to do it... It's not good because I'm not getting to plan really effectively and think about everything I'm actually going to say during the lesson. It makes it confusing not only for the students but for me too because it's not flowing the way I want it to flow. (Interview, 03/11/08)

Teaching historical thinking requires more work from teachers because it runs counter to traditional history curriculum materials and teaching practices. Thus, having or setting aside sufficient time to plan activities and design materials for students is essential. The difficulty for these first year teachers was finding a balance between

working all hours of the day and risk burning out too soon, and not committing enough time in an effort to avoid burning out. Bryan and Maya worked at opposite ends of the spectrum whereas Steve seemed to maintain a balance between the two extremes. Steve worked hard and was extremely devoted to his work, but he did not worry about being perfect and was not overly self-critical. Steve was considered part-time his first year (he taught four classes and full-time staff taught five), and he had two preps (U.S. history and a 7th grade world cultures class) whereas Bryan was full-time and had four preps (U.S. history, government, Avid, and yearbook). As these teachers continue in their professional lives, it will be especially important for Bryan and Maya to find a balance in their work ethic that allows them to teach their students how to think historically while not burning out early in their careers.

Conclusion

A number of factors influenced how Steve, Bryan and Maya designed instructional activities in their first year of teaching. In examining these factors, it was evident that teachers' learning in teacher education and their working contexts had a significant impact on their decision making. The extent of this influence was mediated by other factors, such as teachers' disciplinary understandings, vision of practice and personal dispositions.

The teacher education program appeared to greatly influenced teachers' decision making because the teachers in this study regularly implemented strategies and pedagogical methods learned in their course work. The methods courses introduced Bryan and Maya to historical thinking, and they developed their disciplinary knowledge throughout the program. Steve who had entered the program with stronger

understandings learned how he could bridge the gap between disciplinary and school history by incorporating these ways of thinking in a secondary classroom. All three teachers developed their pedagogical content knowledge and learned how to scaffold students' historical thinking.

After graduating from the program, each teacher entered a new working context and received messages about teaching and student learning that often conflicted with the teacher education program. Whereas the program emphasized in-depth inquiry and historical thinking strategies, the district curriculum and fellow colleagues did not necessarily support these practices. For Steve and Bryan, content coverage and department-wide schedules made it difficult to slow down and study topics in greater detail. Maya did not encounter these same pressures, but she faced the challenge of working independently from her department colleagues. Without a shared vision of practice across the social studies department, all three teachers lacked the supports necessary to plan and fully implement reform-minded instruction (cf. Hammerness, 2001).

Steve, Bryan and Maya worked in different contexts, yet they all struggled to find effective supports from their schools and districts to implement reform-minded instructional practices in history. Teachers' understandings, beliefs and dispositions helped mediate the impact of contextual influences on their decision making. Steve's disciplinary knowledge aided his ability to design inquiry activities that emphasized historical interpretation. Although Bryan lacked this same expertise in the discipline, his work ethic guided his practices and made it possible for him to infuse aspects of historical thinking (e.g., reading and analyzing primary sources) almost daily. Maya had

the knowledge to teach these ways of thinking to her students, but her lack of motivation and fear of burning out led to a different approach in which she relied on more traditional practices.

Where, then, do these findings lead us? How can teacher educators and practitioners help new teachers implement reform-minded practices in school contexts that might not always advocate or have knowledge of these ways of teaching? What contextual factors need to be modified to support historical thinking? How can researchers contribute to reforming history education? The final chapter offers insight into the implications of this research and how we can create conditions that support discipline-based practices.

Chapter 8: Conclusions and Implications for Teacher Education, Practitioners and

Future Research

Teaching historical thinking in school and district contexts that adhere to traditional practices is challenging. The goal of implementing reform-minded instruction in schools runs counter to static practices that continue to permeate secondary history classrooms (Cuban, 1991). This study confirms previous research (e.g., van Hover & Yeager, 2003, 2004; VanSledright & James, 2002) that has revealed the challenges of teaching historical thinking within a larger policy context that prioritizes standardization and content coverage. Enacting instruction that promotes historical thinking may be an even greater challenge for first-year teachers who are learning how to plan instruction while managing the stresses that accompany being a novice in the classroom. The following chapter examines the tensions that existed between the reform-minded teacher education program and the local schools and districts where Steve, Bryan and Maya worked. It offers insight into how various factors facilitated teachers' efforts to manage those tensions and more specifically why Steve was able to more consistently teach historical thinking. The chapter concludes by presenting a new conceptual framework for studying teachers' practices within these competing contexts and offers additional insights for future practice and research.

The Tension between Teacher Education and Local School and District Contexts

In this study, teacher education influenced teachers' practices to varying degrees; however the extent of that influence was dependent on a number of other factors, primarily the school and district context. Within the context of the teacher education program, teachers made historical thinking central to their goals and instructional design.

The cohort of teacher candidates examined how students learn history, designed lessons that promoted historical interpretation, and learned how to make historical thinking central to their instruction. In the teacher education community, teachers were supported by their University colleagues and instructors to implement practices grounded in the discipline. The methods courses provided teachers with a professional learning community in which they learned with and from their colleagues (cf. Westheimer, 2008). They examined their practices together and analyzed student learning with a focus on historical thinking. The challenges began when teachers then entered school and district contexts that did not share this same vision of practice.

Steve, Bryan and Maya found themselves in schools and districts that emphasized content knowledge over disciplinary understanding. Curriculum pacing guides and assessments prioritized names, dates and events in history rather than disciplinary thinking. Teachers felt pressured to cover the content in the pacing guides within certain time constraints, and all three teachers had to administer semester, quarterly or unit assessments mandated by the district. The school and district focus on content coverage and objective multiple choice assessments directly contrasted with everything that had been emphasized in the teacher education program. These teachers had to manage that tension daily. Steve emerged as the teacher who was best able to manage the competing aims between what he had learned in teacher education and what he faced in his daily experiences at Lincoln Middle School. Two questions emerged as important in better understanding this tension: What enabled Steve to best manage the tension between historical thinking and content coverage? How did these factors (e.g., disciplinary understanding) help him teach historical thinking?

Managing the tension between teacher education and schools and districts:

understanding differences in local contexts. Steve, Bryan and Maya taught in different schools and districts that influenced their teaching in various ways. Both Carrollton County Public Schools and Westfield County provided teachers with curriculum pacing guides that emphasized content coverage over historical thinking. Although each district emphasized content coverage, the CCPS framework presented history more thematically and provided Steve and Bryan with examples of essential questions to use with their students. CCPS also included excerpts from primary sources in some of their detailed lesson plans. The Westfield County framework differed in that it presented history chronologically rather than thematically. The pacing guide did not provide Maya with essential questions to link her lessons or with detailed lesson plans that she could then modify. Her curriculum emphasized the textbook as the main source of information and did not include many primary source documents.

A second key difference in these teachers' working contexts was the secondary level (middle versus high school) and how this resulted in different pressures. The middle school curriculum covered content that spanned from 1763 to 1877 (114 years) whereas the high school curriculum covered historical content from 1865 to the present (145 years). Bryan and Maya were also expected to teach more units than Steve. Bryan had eight units of instruction outlined by the county and Maya had six, whereas Steve only had four. Steve had less content to cover in middle school, and this may have resulted in his ability to better manage the pressures between coverage and historical thinking. Similarly, Bryan and Steve faced different assessment pressures at the high school and middle school levels. Bryan had to administer mandated CCPS end of unit exams and

could not create additional summative assessments. Steve's 8th grade teaching colleagues provided him with chapter tests to administer to his students, but he had the freedom to design additional summative assessments to balance the multiple choice exams. Steve faced fewer constraints teaching in his middle school, and this too may have helped him overcome some of the tensions between teacher education and his school and district context.

The role of teachers' disciplinary understanding in managing the tension between historical thinking and content coverage. Previous research in history education has uncovered the important role that disciplinary understanding plays in instructional decision making (cf. Wilson & Wineburg, 1988; Wineburg & Wilson, 1991). More recent research (e.g., Hartzler-Miller, 2001; van Hover & Yeager, 2003, 2004; VanSledright, 1996) has shown that having an understanding of the discipline is important, but it is often not sufficient when teachers aim to teach historical thinking and historical interpretation in today's classrooms. This study confirms these findings, but it also suggests that strong disciplinary understandings in combination with other factors (e.g., a vision for teaching historical thinking, tools from teacher education) can facilitate reform-minded practices. Steve began the teacher education program with a solid background in history and a strong understanding of the discipline. The teacher education program then provided him with conceptual and practical tools that enabled him to translate his understandings into instructional practices that made historical thinking accessible to his students. He credited the program with helping him bridge in his own mind the gap between traditional school history and disciplinary history. Bryan and Maya, on the other hand, entered the program with educational and professional

backgrounds in government. The methods courses played a critical role in introducing them to discipline-based ways of thinking, and their knowledge of the discipline developed throughout the program. However, their understandings were not as well-developed as Steve's, and they struggled to fully implement historical thinking and interpretation in their first year of teaching.

Steve's disciplinary knowledge facilitated his efforts to overcome the pressures to cover content, but his vision and beliefs about teaching history further enabled his implementation of discipline-based practices. He developed a vision in teacher education that emphasized historical inquiry, and he firmly believed in the importance of teaching students to analyze evidence and interpret the past. His vision and goals for student learning aligned with the messages of the teacher education program, and this provided him with the tools to manage the tensions he faced between covering content and teaching historical thinking. Steve did not emphasize historical thinking every day, but he incorporated historical investigations in the majority of his lessons.

Teachers' disciplinary understandings also influenced the ways in which they relied on conceptual and practical tools from the teacher education program. All three teachers incorporated practical tools from teacher education, but Steve consistently used them as a means to encourage historical interpretation in his classroom. Bryan and Maya used a number of strategies, such as sourcing and the Spanish American War inquiry, but they struggled to incorporate more conceptual tools, such as teaching history as an inquiry process and fostering interpretation. Bryan and Maya used the practical strategies in their teaching practices, but without the epistemic beliefs to support them, they

struggled when it came to fully implementing discipline-based practices in their classrooms.

The emergence of a new conceptual framework. This study highlighted the tensions that exist between reform-minded teacher education programs and school and district contexts. Teachers are left at a crossroads when considering the competing goals of teacher education and local schools and districts. The strength of teachers' disciplinary understandings in conjunction with their visions, dispositions, and tools influences the extent to which they are able or unable to implement reform-minded practices. After completing my analyses, it became apparent that the original conceptual framework used for data collection and analysis did not adequately depict the misalignment between these two competing contexts and the tensions that teachers encounter. Figure 2 provides a new framework that more accurately reflects the tensions that teachers face and highlights other factors that influence teachers' practices within these two contexts.

In Figure 2, an individual teacher's practices are located at the center of the diagram. These practices influence and are influenced by the teacher's vision of practice, dispositions and beliefs about teaching, available conceptual and practical tools, and his/her understanding of the discipline and of how to make content accessible to students. This mutual influence is represented by the adjoining circles. The factors that influence a teacher's practices also influence one another, and this is represented by the double arrows. A teacher's practices are also located within two competing contexts: teacher education and the local school/district. On the figure, the opposing sides of the overlapping circles represent the tensions that teachers encounter between these often

competing contexts. This new framework provides better insight into the implications for future practice and research.

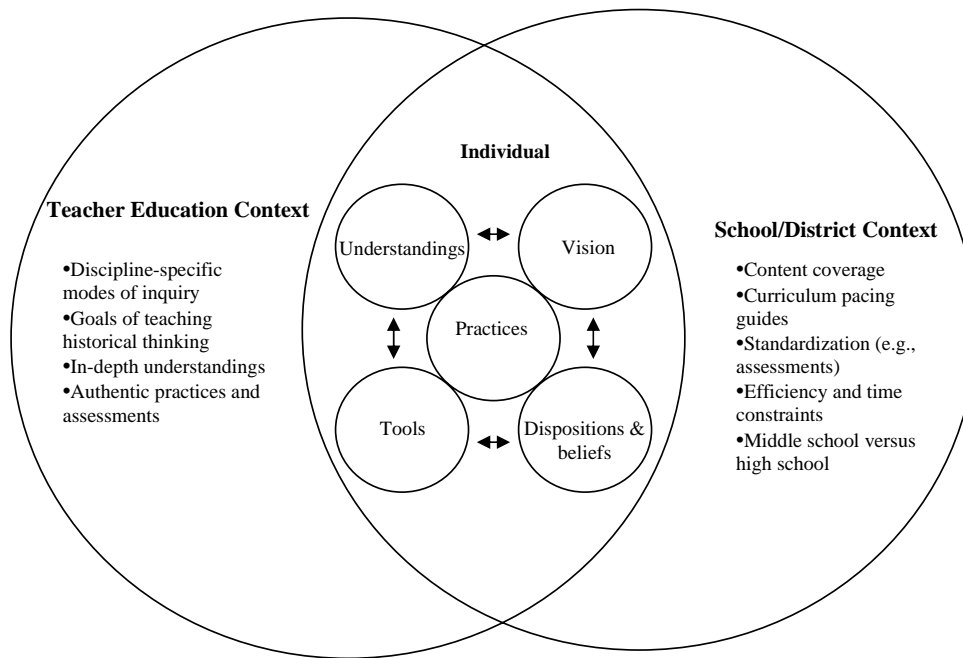


Figure 2. Teaching historical thinking within competing contexts.

Implications for Teacher Education

Without significant changes in how schools and districts approach history education, new teachers who learn innovative instructional methods in teacher education will continue to face the tension between meeting coverage goals and teaching historical thinking. Although these findings are disheartening, this study upholds Bain and Mirel's (2006) argument that teachers need to learn how to teach disciplinary thinking within standards-based, high stakes contexts. Research lacks examples of how to do that

effectively, but these cases provide insight into how teacher education programs can better prepare new teachers to encounter and manage these tensions.

The teachers in this study first encountered the tensions between the University and local schools and districts during their teacher education program. While Steve, Bryan and Maya learned to teach historical thinking in their university-based methods courses, this was not the focus in their field placements. Mentor teachers and supervisors did not uphold the same standards and vision of history teaching as the university's course instructors. Teachers had to meet the demands of their mentor teachers, and these did not necessarily align with the goals of learning to teach students historical thinking. Similarly, supervisors did not often focus on these ways of thinking because many did not have knowledge of these disciplinary modes of knowing.

Given the tensions that teachers faced within their teacher education program, how could the program better prepare teachers to enact reform-minded practices in schools? One possibility is to ensure that all individuals involved in new teacher learning have a well-developed understanding of teaching and learning in the discipline. Supervisors might work alongside instructors to understand the goals for teacher candidates and how to assess teacher candidates' learning. If teacher education programs found mentor teachers who embraced these ways of teaching, they could help provide examples of practices that align with visions of history teaching that promote historical thinking. For example, Steve may be a good candidate for future mentoring if he is able to sustain and further develop his discipline-based practices. Consistent support from school-based mentors, supervisors and instructors could help teacher candidates succeed in implementing practices aligned with the discipline. These implications extend beyond

history education and apply to other disciplines, such as math and science, within teacher education programs.

Although teachers' implementation of historical thinking was not perfect, it is important to recognize the role that teacher education did play in providing novice teachers with practice tools to utilize in the classroom. When these teachers had well-designed resources (e.g., inquiry lessons from *Historical Thinking Matters*) that were made by experts in the field, it was more likely that they taught historical thinking. Given county curriculum materials do not often emphasize historical thinking and interpretation, teacher education programs (as well as other organizations that promote instructional reform) play an important role in providing teachers with practical tools (e.g., units and individual lessons that promote historical inquiry and interpretation) that they can then modify and implement in their own classrooms.

This study also leads to questions about the current structure of teacher education programs. Given that many aspiring social studies teachers will enter teacher education without strong disciplinary understandings, to what extent should teacher education focus on cultivating teacher candidates' disciplinary understandings? How should this compare to the program's focus on developing teachers' instructional strategies? How will teacher education programs better support candidates' understanding of the discipline so that they can be successful in fully implementing these practices in the field? Bryan and Maya developed their understandings during teacher education, but how will they now continue to develop their practices? Is one year of teacher education enough to counter what they will experience throughout their teaching careers? Will they be more influenced by their

school and district contexts as time moves on? Will the influence of teacher education begin to fade?

Learning how to teach in reform-minded ways is an ongoing and challenging process. Although learning begins in preservice teacher education programs, these brief experiences might not be enough to sustain these practices. A one-year graduate program (or an equivalent integrated undergraduate program) is arguably not long enough to significantly alter teachers' apprenticeship of observation, knowledge of the discipline or beliefs about teaching (Barton & Levstik, 2004; Slekar, 1998). If one looks at other professions, the learning process may span multiple years and involve various internship or learning experiences. If teacher education programs had more time with teacher candidates, they could provide them with more opportunities to develop an understanding of the discipline while teaching them to make these modes of thinking more accessible to their students. Programs could also go further in-depth to expose teacher candidates to authentic activities and projects (e.g., creating documentaries and websites) that engage students in historical research. Since it is unlikely for the structure of teacher education programs to change in the immediate future, it suggests a greater need for induction programs and professional development experiences that help teachers continue to develop their expertise and maintain a focus on innovative, discipline-based instructional practices.

Supporting Historical Thinking through Induction Programs and Ongoing Professional Development

The primary purpose of induction programs is to help new teachers transition from preservice education to the beginning years of teaching (Gold, 1996). Current

programs aim to improve practice (Gold, 1996), increase retention rates (cf. Ingersoll, 2001; Ingersoll & Smith, 2003), promote personal and professional well-being (i.e. prevent burnout) (cf. Gold, 1996; Huling-Austin, 1990), and focus new teachers' attention on equity and diversity (cf. Achinstein & Athanases, 2005; Worthy, 2005). However, current research does not provide evidence of induction programs that help teachers implement reform-based practices that align with the discipline. Although the teachers in this study received various district-level supports (e.g., new teacher training and consulting teachers), none of these supports focused on discipline-specific practices. If teachers had access to university-based induction programs that supported their enactment of discipline-based instruction, it could help them better manage the tension between disciplinary history and school history. Whether teaching history, math or science, new teachers need continuous supports from the district and university to implement reform-based pedagogies and push back against colleagues who maintain traditional and outdated practices. The beginning years are particularly challenging and without ongoing supports from experts in the field, it can make it more difficult to sustain reform-minded practices.

In addition to university and district-based induction programs that help novices make the transition from students of teaching to teachers of students, there is also a need for ongoing professional development experiences that promote lifelong learning in the teaching profession. Current research highlights the importance of teacher learning communities, group of teachers who take an “inquiry stance” (Cochran-Smith & Lytle, 1999) and work together to critically examine and learn from practice (cf. Cochran-Smith et al., 2009; Westheimer, 2008). Steve, Maya and Bryan all worked in isolation from

their colleagues; none of them belonged to a learning community in which teachers regularly gathered to discuss practice and analyze student learning. Ideally, if Steve, Bryan and Maya were members of a learning community, they might meet regularly with colleagues to design inquiry-based lessons and authentic assessments, discuss the implementation of those lessons and what students learned, recommend strategies to better scaffold students' historical thinking, and suggest ways to improve pedagogy. The opportunity to collaborate with colleagues to plan, implement and reflect upon discipline-based instruction may have a significant influence on their practices as well as other teachers' practices. Teacher education programs should consider how university-sponsored induction programs could continue to influence teachers after they graduate.

Implications for Future Research

The conceptual framework generated by this study provides insights for future research. How do teachers manage the tensions between the goals espoused in their teacher education program and the stated goals of local schools and districts? If disciplinary understandings are important, how can we better understand how teachers like Bryan and Maya best manage those tensions? It will be important for researchers to focus more on the dynamics of this tension and find teachers who are able to implement reform-minded teaching practices within challenging contexts. These insights could then be used by teacher education programs to better prepare new teachers to confront static teaching practices and teach historical thinking given external constraints. Researchers also need to focus on the benefits of these teaching practices for student learning, which will be a helpful tool in convincing policymakers of the benefits of teaching historical thinking rather than covering content.

Future research should also examine teachers in contexts that extend beyond the traditional public school district. The author of this study was particularly interested in how teachers who learn to teach in discipline-specific ways are able to implement reform-based practices in schools where the tension between teacher education and the school/district is not as apparent or perhaps is nonexistent. Unfortunately, none of the teachers in the graduating cohort entered a teaching context that provided a lot of autonomy and support or operated as a learning community. One possible study would involve examining the practices of graduates who work in schools (e.g., an independent school or charter school) where structures have been put in place to regularly collaborate with colleagues to teach in reform-minded ways. What would happen to teachers' practices if they entered schools driven by instructional reform? How would someone like Steve develop in a school where multiple staff members embraced disciplinary thinking in history? Would Bryan have to work to the point of over-exhaustion if he collaborated with colleagues to generate ideas and design instruction? Would Maya still teach history in a traditional way if she worked with peers who emphasized historical thinking? If a group of graduates taught U.S. history in the same school, how would that then influence their instructional decisions and collaborative efforts? These are all areas for future exploration.

Because this study only followed participants through their first year of teaching, it is unknown if they significantly changed their pedagogical methods over time once they acclimated themselves to the classroom. More longitudinal studies are needed to examine how teachers who learn to teach historical thinking in teacher education then enact those practices over time. As teachers gain experience, how do their practices

develop? Do they eventually exhibit levels of expertise in teaching historical thinking? Or do they succumb to the pressures of local schools and districts? Models of expert practice would have practical implications for novices who are learning to design and implement research-based practices.

Finally, this study raises questions about how teacher education programs best develop prospective teachers' understandings of the discipline. Both traditional and alternative teacher education programs focus to various extents on the importance of disciplinary knowledge. Research should examine how and to what degree different programs develop teachers' disciplinary understandings and how these distinct approaches impact teachers' understandings of the discipline and how they teach historical thinking in their classrooms.

This study provides new insights about how novice history teachers enact discipline-based practices and the various factors that shape their instructional decision-making. These three teachers demonstrated a range of practices when teaching historical thinking: these varied from asking students to identify the author of a document to engaging students in in-depth inquiry activities that encouraged historical analysis and interpretation. Teachers faced the challenge of developing their practices in contexts that contradicted one another. This tension between the practices promoted by the teacher education program and those embraced by the school and district context presented a significant dilemma for these novice teachers. A number of other factors also influenced these teachers' practices: these included their understanding of the discipline, vision and beliefs about teaching history, knowledge of how to make these thinking strategies accessible to students, available tools and resources, and individual dispositions. This

study highlights the complex nature of how history teachers learn and develop and offers insight into how researchers and practitioners can support the implementation of reform-based practices by better preparing teachers to manage the tension that exists between the goals of research-based teacher education programs and the goals of local school and district contexts.

Appendix A

Observation Protocol

Teacher #:

Observer:

Location:

Course/Setting:

Unit:

Date:

Time:

Description of Setting/Classroom (e.g., number, gender, and background of students; set-up of classroom)

Purpose of Observation:

Notes: (Time noted every 5 minutes; descriptive field notes; comments/analysis in italics)

Appendix B

Methods Instructor Interview Protocol (Sample Questions)

1. What are the characteristics of an effective social studies teacher?
 - a. What does the classroom of an effective social studies teacher look like?
2. What were your goals for teacher candidates this year? (I don't know if you want to talk about the fall and spring courses separately or if you see them together as one big course.)
 - a. Why did you choose these particular goals?
3. What challenges did teacher candidates face in reaching these goals?
4. On a number of occasions you asked teacher candidates to bring standards documents to class, and you also had teacher candidates incorporate standards in many of their lesson plan assignments.
 - a. What role do you think standards play when teaching history?
 - b. What were your goals for having teacher candidates focus on standards documents in your methods classes?
 - c. If mentions what/how dichotomy, "To what extent do you think teachers have the ability to challenge the *"what"* in their classrooms? Is there any leeway there?"
5. A few times during class, you told teacher candidates that you don't expect them to teach these ways of knowing in history every day or every unit. Can you talk more about that? What do you expect them to be able to do next year?
 - a. If not teaching an inquiry-lesson, SAC (structured academic controversy), or OUT (opening up the textbook) every day for example, what do you think a good daily lesson looks like? To what extent should historical thinking be present?
6. I am interested in learning more about your perceptions of how Steve, Bryan and Maya did in your class.
 - a. What are each teacher candidate's strengths?
 - b. What are his/her weaknesses or areas for growth?
 - c. Did you see (teacher candidate) grow over the year? How?
 - d. Do you have any concerns at this point as this teacher transitions to his/her first year of teaching?
 - e. Is there anything else you want to share about this teacher?
7. Overall, in thinking about the teacher education program, what do you see as its strengths? Weaknesses?
8. Is there anything else you would like to share about your class or the teacher education program?

Appendix C

Teacher Candidate Interview Protocol (Post-Fall Semester Sample Questions)

1. (Discuss each course and what teacher candidates learned. Have syllabi as resource.)
 - a. What did you take away from the course (diversity, action research, methods)?
 - b. What in-class activities, assignments, or readings were more/less helpful to your learning?
2. Have you tried to implement any of the ideas from the methods course in your placement?
 - a. Tell me about a time when you taught in the ways discussed in your methods class. What were your thoughts about the experience? How did it go? Why did it go the way it did (probe based on what they say in previous question)?
 - b. What did students learn from the lesson? How do you know (getting at evidence of student learning)?
 - c. How often do you think you teach history as interpretation (involving investigation or inquiry-based methods) in your field placement? When you're not teaching this way, what do you do?
 - d. What factors support or constrain your ability to teach using inquiry or investigative methods? (If not teaching this way, what supports are needed to teach in this way?)
 - i. What are the challenges in teaching historical inquiry?
 - ii. Do you have concerns over teaching these ways of knowing to students?
3. Describe your relationship with your mentor teacher.
 - a. What do your mentor's goals for teaching history/social studies seem to be?
 - b. Are your mentor's teaching practices similar or different than what you're learning about teaching in the program? In what ways are they similar/different?
 - c. What have you learned about teaching history/social studies from your mentor? Explain.
 - d. Do you think your mentor has influenced your instructional decisions? If so, how?
 - e. Also, what opportunities to teach or learn about teaching do you have in your mentor's classroom?
4. What's your relationship like with your supervisor?
 - a. Does your supervisor give you advice about teaching that is similar or different from messages you receive in the methods courses and other university courses?
5. What do you think about the district's curriculum standards (assessments if applicable)?
 - a. Do you think they influence how you plan and teach? How?

6. How do you think about assessment in your own classroom?
 - a. How do you assess students? How often?
 - b. What do you do with the information gathered from assessments?
7. At this point in the year, when you look to the future, what is your ideal vision for teaching history? Do you think your vision is attainable or reachable in the future? Why or why not?

Appendix D

1st Year Teacher Pre- and Post-Unit Interview Protocols

Example Pre-Unit Questions

1. How do you want to teach your history class this year? In other words, what's your ideal vision for teaching history?
 - a. Are there constraints on what you are able to do/not do?
 - b. What are your goals for students this year?
 - i. What do you want them to learn in your class? What do you want them to do in your class? Why?
 - c. What are your goals for yourself? What do you want to be doing? Learning?
2. Let's talk about the upcoming unit.
 - a. Will you walk me through your planning process at this point?
 - i. Have you been able to plan or think through the unit?
 - ii. If so, how do you plan the unit?
 - iii. Do you have goals for students in the unit? What are they and why did you decide to have these particular goals?
 - b. How have you organized the unit?
 - i. What major topics are you choosing to teach? Why did you choose these topics?
 - ii. Have you chosen to add new content to the unit (in addition to what is in the curriculum framework)? Delete anything? Why?
 - iii. What resources are you using to plan the unit? Where did you find those resources?
 - iv. Did you use the state and/or district standards in planning your unit? The district curriculum guide? District or school assessments? If so, how?
 - v. What challenges are you facing in planning this set of lessons?
3. Let's turn now to talking about your assessment plan. (This might come in post-interview instead. I also cut some questions for larger project interviews.)
 - a. What role does assessment play in your classroom?
 - i. What kinds of things do you do to assess students?
 - ii. When do you tend to assess students?
 - iii. How often do you assess students?
 - iv. Do you use the information you gather from assessments? If so, how?
 - b. What summative assessments are you using at the end of your unit? Why did you select this (these) particular assessment(s)?
4. Let's talk about the school community
 - a. How would you describe the student population? (If prompting necessary, say trying to get sense of students—where from, SES, racial/ethnic background, motivation, ELL, etc.) What have you learned about your students thus far?

- b. Does the principal or AP help you with your teaching in any way? If so, how?
 - c. How often do you meet as a department (and/or US history or grade-level team)?
 - i. Does the department set any particular goals or expectations for teachers regarding instruction and assessment?
 - ii. Did anyone in the department help prepare you for your first year of teaching? If so, how?
 - iii. How does your department chair/team leader work with you on instruction or assessment?
 - d. How does the school handle evaluations of new teachers (PAR or other system)? What kinds of messages do you get about how to teach from this process? What do you think of this process?
5. I'm interested in learning how the district prepared you for your role as a beginning teacher.
- a. Did you have any formal induction program prior to starting the school year? If so, what did you learn from that experience? What did this program say about how to teach? (See if have any handouts/resources from program.)
 - b. Do you have a district or school assigned mentor? If so, what is his/her role in helping you learn to teach?
 - c. Are you aware of any professional development opportunities that are available for beginning teachers or social studies teachers? Think broadly: This could be anything from ongoing contact with a mentor to informal meetings among peers to attending a workshop.

Example Post-Interview Questions

1) Questions for each lesson topic: (e.g., Election of 1828, Tariff of 1828 and Nullification Crisis, Jackson and the National Bank, Trial of Tears, Mexican American War, Gold Rush). Here is a calendar of the days I observed. Now we won't go over each day in detail since there are so many, but let's walk through each of the 6 major topics and talk about the resources and pedagogical methods you used, and any changes you would make.

- a) Why did you select this topic?
- b) What did you want students to learn this day(s)?
- c) What led you to select the materials you used (specify) for this day(s)?
 - o Day 2c→ The curriculum provides an inquiry type lesson for the Trail of Tears with documents and a chart. I noticed you found your own documents and created your own document analysis chart for students. Why did you decide to create your own inquiry? How did you decide on these particular documents and document questions?
 - o Day 2ghi→ How did you select these particular documents for the Mexican American War activity? Where did you find the documents, and did you modify them for students? If so, how?
- d) What led you to choose this activity (e.g., stations) for this day(s)?
- e) Would you change anything for the next time you teach this topic/lesson?

- 2) Questions for the whole unit:
 - a) When you think about these 11 days, did anything in your mind link these lessons?
 - b) What did you want students to learn in the unit?
 1. What do you think your students learned from the unit? How do you know?
 2. What challenges did students have in the unit? How did you address student challenges?
 - c) What challenges did you have in planning the unit?
- 3) Questions about Assessment:
 - a) Following the inquiry on the Mexican-American War, you had students write a letter to the textbook company to argue their position on whether or not the “War with Mexico” as they call it should be labeled the Mexican American War or the US Invasion of Mexico. How did students do on the assessment? Overall, what were their strengths/weaknesses in their writing? Did students tend to argue more on one side than the other?
 - b) Examining student work: I would like to have you take a look at 3 examples of students’ writing. Please select a below average, average, and above average response to discuss.
 1. How did you provide feedback to students? What did your feedback focus on?
 2. I know you included a rubric for the letter. How did you decide on this particular rubric? How often do you create rubrics such as this?
 3. Overall, what were the strengths and weaknesses in students’ responses?
 4. What would you say each student understands or does not understand?
- 4) Questions about Influences on Teaching Practice
 - a) Ranking exercise: If we were to take this unit and try to rank the influences on your instructional decisions, what would you say from 1-5 are the top influences on your teaching practice (have teacher rank and then discuss together)? How does it influence you? To what extent? (*Follow-up based on responses.*)
 - b) In the fall I asked you about your department and school and I would like to follow-up on that. Can you describe the culture of your social studies department? How often are you meeting as a whole department? What have you been doing lately during your department meetings? I know your 8th grade team meets during 4th period, but do you ever have other team meetings when you are involved? If so, what do you meet about?
 - c) I know you have worked with a consulting teacher this year. How has she supported you in your teaching? How often do you have contact with her? Do you find her mentoring helpful? Has the county or school provided you with any other supports as a new teacher?
 - d) What professional development have you experienced this year? Can you describe what you did and if you found it useful?

Appendix E

Pre- and Post-Assessment Example Questions

Background Information

Name: _____

ID Code: _____

Undergraduate Major: _____

Undergraduate Minor: _____

Graduate degree? NO YES

If yes, please indicate type of degree and specialization: _____

Please indicate the number of courses you have previously taken in the following areas:

History _____ Of these, how many in the last 5 years?

Political Science _____ Of these, how many in the last 5 years?

History research methods _____ Of these, how many in the last 5 years?

Teaching/Education _____ Of these, how many in the last 5 years?

Reading _____ Of these, how many in the last 5 years?

Writing _____ Of these, how many in the last 5 years?

Open-Ended Response Questions

1. How would you define history? What is history?
2. Please describe your experiences as a student in past history classes (high school and/or college). How were these courses taught?
3. How do you envision teaching your own history class?

Extended Response Questions

Teacher candidates read 5 primary source documents and answered the following questions:

1. Using these sources and your own knowledge, explain to what extent you agree with the statement, "The American effort to preserve the Indo-Chinese peninsula from Communism was long-drawn out and ended in total failure."
2. Use these documents to sketch a one-day lesson plan for 9th grade students who read at grade level. Assume this is your first week of class with these students.

Appendix F

Ranking Task: Influences on Instructional Decision Making

Directions: The following list represents different factors that may or may not influence your planning and instructional decisions. In thinking about this unit, please rank the top 5 influences on your instructional decisions from 1 to 5 (1 being the greatest influence) to indicate which factors had the most influence on your teaching.

Your experiences as a history student in high school and undergrad classrooms _____

Your students' incoming skills, knowledge, and interests _____

District standards, curriculum, or assessments _____

Your teacher education courses _____

Your knowledge of how historians approach historical study _____

Your ideal vision of how you want to teach history in your classroom _____

Your social studies department (e.g., department chair, team leader, other teachers, or department-provided exams) _____

Your beliefs about the purposes of history education (how and why it's taught) _____

Your knowledge of how to make content and/or strategies accessible to your students _____

Other (Please specify): _____

Appendix G

Teacher Post-Observation Summary Sheet

Observed Agenda/Activities:

Overall Focus of Lesson (big ideas, goals):

Topics covered/resources

Summary:

Were topics meaningfully linked?

Were topics significant and central to the discipline?

What images and documents were used in the lesson? How were they used in relation to the big idea/goal of lesson?

Historical Thinking

Summary:

Were students asked to use procedural knowledge (i.e. sourcing, contextualization, corroboration) during the lesson? How?

Did the teacher have students read and/or analyze multiple perspectives? If so, what and how were they incorporated in the lesson?

Were other discipline-specific concepts (e.g., significance, cause, evidence) discussed? If so, how?

Scaffolding and Assessment

How did the teacher scaffold students' learning during the lesson?

How did the teacher assess students' learning? Formative/summative assessments?

Contextual factors- Did the teacher indicate or was there evidence of any contextual factors influencing the teacher's instructional choices?

Reflections, analysis, questions

Summary:

Next steps...

Appendix H

Initial codes for analysis

Practices (teaching and assessment)

- 1.1 Sourcing
- 1.2 Contextualization
- 1.3 Corroboration
- 1.4 Evidence-based thinking/writing
- 1.5 Multiple perspectives
- 1.6 Multiple causation
- 1.7 Significance
- 1.8 Historical analysis- teaching students to understand the discipline
- 1.9 Historical interpretation

- 2.1 Summative assessment
- 2.2 Formative assessment
- 2.3 Assessing students' incoming knowledge/beliefs
- 2.4 Assessment as writing
- 2.5 Project or performance-based assessments
- 2.6 Feedback on student work
- 2.7 Rubrics (use of)
- 2.8 Using assessment to modify/design instruction
- 2.9 Peer or self-assessment
- 2.10 Goal/assessment alignment

Understandings

- 3.1 Knowledge of the history discipline
- 3.2 Pedagogical content knowledge (scaffolding, making content accessible)
- 3.3 Knowledge of learners/how students learn

Tools (conceptual and practical resources)

- 4.1 Primary documents
- 4.2 Secondary documents (other than textbook)
- 4.3 Textbook
- 4.4 Curriculum documents
- 4.5 Theories of how students learn

Dispositions (habits of thinking and action)

- 6.1 Views of students
- 6.2 Reflective practice
- 6.3 Work ethic

Vision

- 7.1 Beliefs about teaching history (how it should be taught)
- 7.2 How envision teaching history

7.3 Goals for student learning

Learning contexts/communities (influences on teaching/assessment practice)

Teacher Education Community

- 8.1 Methods courses
- 8.2 Other teacher education coursework
- 8.3 Internship experience
- 8.4 University supervisor

School/District Community

- 9.1 Department/team influence (coverage pressures)
- 9.2 School culture (e.g., collaborative, isolated)
- 9.3 School/district-provided assessments
- 9.4 Administrative support
- 9.5 Professional development/mentoring/induction
- 9.6 District curriculum

Appendix I

Initial coding example: Excerpt from pre-unit interview with Steve

MC: What's your vision for teaching history?

Steve: Well, my big vision is I want to emphasize the fact that history isn't set in stone and to encourage my students to understand and to participate and actually provide their own interpretations for history. And the phrase that's a good one to use is I'm trying to get them to be history-makers instead of history memorizers. That's a big goal. Another skills goal I'm focusing on this year is really improving writing and how to write, not only, in a number of different formats, whether historical argument or any type of writing. After seeing last year what they were required to do in 9th grade, I think it's important to start now in building up their writing skills for next year.

Comment: 7.2 How envision teaching history

Comment: 1.9 historical interpretation

Comment: 7.3 goals for student learning

Comment: 1.4 historical writing

Comment: 6.3 Internship experience

MC: What do you envision your students doing in your class?

Steve: A lot of historical investigations. I try to, as I'm planning out especially this unit and moving forward, starting small and trying to eventually get bigger in terms of how to investigate history so we're going to start by, how do you first of all, what is the difference between primary and secondary sources? How do we know history? How do historians and other people write about history? What do they use? Getting them to understand that. Then moving into and building into more in-depth historical analysis skills.

Comment: 7.2 how envision teaching history

Comment: 3.1 knowledge of history

Comment: 1.8 Historical analysis

Comment: 7.3 goals for student learning

MC: Why do you want students to do or learn these things in your classroom?

Steve: I think it's important. The way I always see it, history is, you know, it's changing. It's not as hard a science as some kids think it is. It's not something that...the thing I showed on my back to school night, Rush Limbaugh. I think Kevin actually showed us in the summer. He says, history is simple. It's what happened. And it's not as simple as that. And that is one of the focuses I want them to see that it's more than just historical facts. There's so much more that goes into the process of making history and writing history and interpreting the past. There was another part to that question I think. Was there?

Comment: 3.1 knowledge of history

Comment: 6.1 methods courses

Comment: 7.3 goals

MC: Why you want kids learning and doing these things in your classroom.

Steve: Oh, right. Well the way I see it and in science classrooms, we practice, or they practice how to think and act like a scientist so I think it's important in the history classroom to encourage kids to think historically and to approach history the way people in the discipline do it. All be it at a much smaller scale but it's important to get them to embrace how to make history, how to interpret. It's not as simple as just reading facts out of a book. It's much more involved.

Comment: 7.1 beliefs about teaching history

Comment: 1.9 historical interpretation

Comment: 3.1 knowledge of history

Appendix J

Examples of Pattern (Thematic) Codes

Engages students in process of historical interpretation
Teacher as decision maker
Learning to work within contextual constraints
Teacher education continues to have a significant influence on teaching practice in year 1
Trying to balance vision with contextual factors/constraints
Inquiry stance towards teaching
Misalignment between teaching practices and types of assessments used
Lack of authentic assessments that assess historical thinking

Appendix K

Analytic memo excerpts

Example 1: May 29, 2009

How does Bryan teach history/historical thinking?

In unit 1, Bryan emphasizes the idea of history as interpretation by challenging students' notion that there is a right or wrong answer.

- “The idea here is not what’s right, what’s wrong. Some of you asked, is this good, not good? You are the historians today, you are the ones who are going to tell me what is good and what is not good. What we’re looking for is, does it answer the question? Does it help us to answer the question? What led the US to invade Cuba? Is it something that helps with that discussion, then yes, I would write it down. I would include it. Or you should have highlighted it. Some of you didn’t even do what you were supposed to do with the highlights. If you didn’t have that, then you aren’t able to go to board to write it down. Any comments, questions on the textbook version?” (OBS1d)
- T- “Again #1. (T reads). I’m not looking for whether it’s yes or no. No right or wrong answer but going to base this on your evidence. Basing this on your evidence. What did you learn from these 9 documents, plus the video, plus textbook excerpt that gave more evidence from Cornell notes? (45:00) So you have 11 different sources of information to pull from to help you better answer this question which is what we’re going to do next.” (OBS1f)
- Students are learning that history is more than just simple facts/explanations: “And so I was asking them, okay so we’ve been talking about the Spanish American War so what kinds of things led to where we are now in having to figure out whether or not we’re going to be part of this war that is killing millions of people and one of the students who was sitting around here somewhere made a comment, well we learned that the Maine wasn’t everything with the Spanish American War and maybe we’re not seeing the whole picture with what’s going on with this war, that there are other factors. I said, great lead into where we are going because that’s what we were going to do next. And it really made me think if we hadn’t done something like that, that comment would have never come up.” (INT1b)

The 2nd unit sets up a contrast to the 1st in that T5 does not emphasize the interpretive nature of history. He primarily uses primary documents to tell a particular story of WWII. Documents are used as a way to cover the multitude of information presented in the curriculum. Students are asked to cite evidence in their written assignments, but they do not interpret history for themselves.

- Here’s why I have to cover them. Because a couple of them, several of them were covered on the test. There was a question on Germany, a question on Potsdam, on Truman Doctrine and the Marshall Plan, NATO collective security there was a question on that so it was a lot of test crap which was the reason. What I would do is get them down to a paragraph like I did with the dropping the bomb sources and do it in two separate activities of 4 and 5. Maybe even combine Germany and

Japan into one source so it's just 4 and 4. That's probably a good way to go and cover those separately.

Example 2: June 6, 2009

Themes in Bryan's data

- Bryan uses sources as a means to telling a particular story. Doesn't talk about history as interpretation like Steve. Instead his focus is on using primary sources to tell a story.
- Tries to engage students by making it more relevant.
- Evidence-based thinking primary HT skill focused on in class.
- Time and coverage are big constraints for him → more so it appears than Steve or Maya
- County curriculum and test big constraints on his teaching
- Students usually only read 1 of many documents in groups. Without reading other docs, lose context and understanding of bigger picture.
- Uses variety of resources in teaching. Lots of primary docs and infuses brief video clips to help visual learner put this into context. All historical or documentary type clips.
- For the most part Bryan reviews work with his students. Assessing what they understand versus Maya who just collects work at end of period without reviewing it.
- Consistently adapts docs for students
- Assessment- assesses history as facts when using county exams

Appendix L

Overview of Steve's American Revolution Unit: Topics, Resources, and Activities

	Lesson Topic	Resources	Activities
Day 1	Boston Massacre	Paul Revere (Patriot) engraving* Henry Pelham (Loyalist) drawing*	1) Introduction to sourcing- is this art? Students consider whether or not their perspective changes once they know the identity of the artist. 2) Class defines "massacre" 3) Teacher leads whole-class historical analysis of 2 images.
Day 2	Boston Massacre	Captain Preston deposition Robert Goddard trial testimony	1) Students complete document chart for 2 images analyzed on day 1 2) Teacher models reading and annotating of Preston account. 3) Students read Goddard account and complete chart for the 2 documents. 4) Teacher leads class in comparison of 2 accounts using a Venn diagram.
Day 3	Townshend Acts Writs of Assistance Boston Massacre Tea Act Boston Tea Party	Textbook and worksheet Liberty Kids ⁴⁸ video- Boston Tea Party	1) Teacher reviews homework answers with students. 2) Class watches Liberty Kids video about Boston Tea Party.
Day 4	Proclamation	Notes	1) Notes on 4 British

⁴⁸ Liberty Kids is a county resource for social studies teachers. They are fictional cartoons about historical events.

	1763 Stamp Act Townshend Acts Tea Act Boston Tea Party Intolerable Acts	Textbook	acts imposed on colonies 2) Mini-lecture Intolerable Acts 3) Students complete homework- textbook reading and worksheet.
Day 5	Lexington Green	Historical fiction excerpt 8 primary/secondary source documents* Worksheet- questions and document chart*	1) Teacher reads fictional account to students. 2) Mini lecture- context building up to Lexington Green 3) Reliability ranking exercise- students rank the reliability of 5 example sources 4) In groups, students read 1 of 8 documents, complete worksheet, and rank reliability of account.
Day 6	Lexington Green	8 primary/secondary source documents* Worksheet- questions and document chart*	1) Students prepare mini presentations in their groups. 2) 6 of the 8 groups present their account information (worksheet answers and reliability of account).
Day 7	Lexington Green	8 primary/secondary source documents* Worksheet- questions and document chart* Quiz	1) Final 2 groups present account information. 2) Mini-lecture on reliability of sources 3) Quiz- multiple choice/short answer
Day 8	Intolerable Acts Lexington and Concord First Continental Congress Bunker Hill	Quiz Homework Map of Boston 1775	1) Teacher reviews quiz and homework answers with students. 2) Brief video clip (5 minutes)- First Continental Congress 3) Lecture- Breed's

			(Bunker) Hill
Day 9	Thomas Paine's <i>Common Sense</i>	Excerpts from <i>Common Sense</i> *	1) Background mini-lecture on Paine and <i>Common Sense</i> . 2) Students summarize 1 excerpt in groups (1 student writes translation on board). 3) Teacher reads and summarizes translations to class.
Day 10	Declaration of Independence	Excerpts from Declaration of Independence*	1) Mini lecture-background leading up to independence 2) Teacher models annotation of 1 st excerpt. 3) Students work independently to annotate remaining excerpts.

* Resources marked with an asterisk indicate county curriculum materials.

Appendix M

Overview of Steve's Westward Expansion Unit: Topics, Resources, and Activities

	Lesson Topic	Resources	Activities
Day 1	Andrew Jackson- Election of 1828	Jackson campaign poster* Profiles of candidates and character cards of fictional voters* Election results map*	1) Students analyze Jackson campaign poster and answer 3 questions. 2) In groups students read profiles and character cards and decide who they would vote for based on the given information. 3) The class discusses each character and how he would vote in 1828. 4) Teacher shows students map with election results, and class discusses why Jackson was the “peoples’ president.”
Day 2	Andrew Jackson- Tariff of 1828 Nullification crisis	Video clip- Teacher Tube Powerpoint slides/notes Primary document- Jackson’s proclamation responding to crisis	1) Students watch video clip on nullification crisis. 2) Students take notes on tariffs and nullification crisis. 3) Class reads primary document and discusses arguments for/against nullification. 4) Students complete review worksheet on differences between north and south (based on earlier lessons).

Day 3	Andrew Jackson- National Bank	Political cartoon- King Jackson* Excerpts from primary documents- Jackson's response to Congress; newspaper accounts 1832	1) Students answer 3 questions about Jackson political cartoon. 2) Teacher leads lecture/discussion on Jackson and national bank.
Day 4	Jackson & Native American Policy- Trail of Tears	Painting- Trail of Tears (1997) Video clip 1 primary document- Indian Removal Act	1) Class analyzes 1997 painting depicting Trail of Tears. 2) Students watch a video clip about Native American assimilation. 3) Class briefly discusses whether Trail of Tears was triumph or failure of democracy from 4 different perspectives. 4) In groups students read primary document and answer questions.
Day 5	Trail of Tears	5 primary documents*	1) Students work in pairs or groups to read the 5 documents and answer questions on the document chart. 2) The teacher reviews most of the questions aloud with the class. Students do not have time to write the BCR.
Day 6	Texas Independence	1830 and 1840 maps of Texas Primary documents- excerpts of Texas Declaration of Independence	1) In partners students use maps to discuss questions about relations between Mexicans and US settlers. 2) Students read and summarize excerpts

			from the Texas Declaration of Independence about causes for why American settlers revolted in Texas. 3) Class discusses causes for revolt and the tensions between settlers and the Mexican government.
Day 7	Mexican-American War	1 of 6 documents on Mexican-American War Document chart	1) Teacher discusses importance of labeling in history and asks students to consider differences among labels: Mexican-American War, US Invasion of Mexico, and War with Mexico. 2) Students work in groups to read 1 of the 6 assigned documents. They are to read the document, discuss the discussion question, and complete the document chart.
Day 8	Mexican-American War	3 of 6 documents on Mexican-American War Document chart	1) Students work in their groups and continue to read 3 of 6 assigned documents and complete the document chart.
Day 9	Mexican-American War	2 of 6 documents on Mexican-American War Document chart	1) Students read final 2 documents and complete rest of document chart. 2) Class reviews some of the documents and evidence to determine which name is more appropriate: the Mexican-American War or US Invasion of Mexico.

Day 10	Mexican-American War	Letter writing assignment Pre-writing graphic organizer Rubric for assignment Example letter 6 primary source documents Document chart	1) Teacher introduces the letter writing assignment. He reads the instructions and provides a pre-writing graphic organizer, a rubric, and an example business letter (for formatting). 2) Students work on the graphic organizer/pre-writing activity. Students use their document charts, and the teacher provides the documents at the front of the room for their reference.
Day 11	CA Gold Rush	Advertisement to settle west Video clip from hippocampus Textbook BCR prompt	1) Students answer questions about advertisement to move west. 2) Students watch a video clip on the Gold Rush. 3) Students read an excerpt in the textbook about the Gold Rush and complete a BCR.

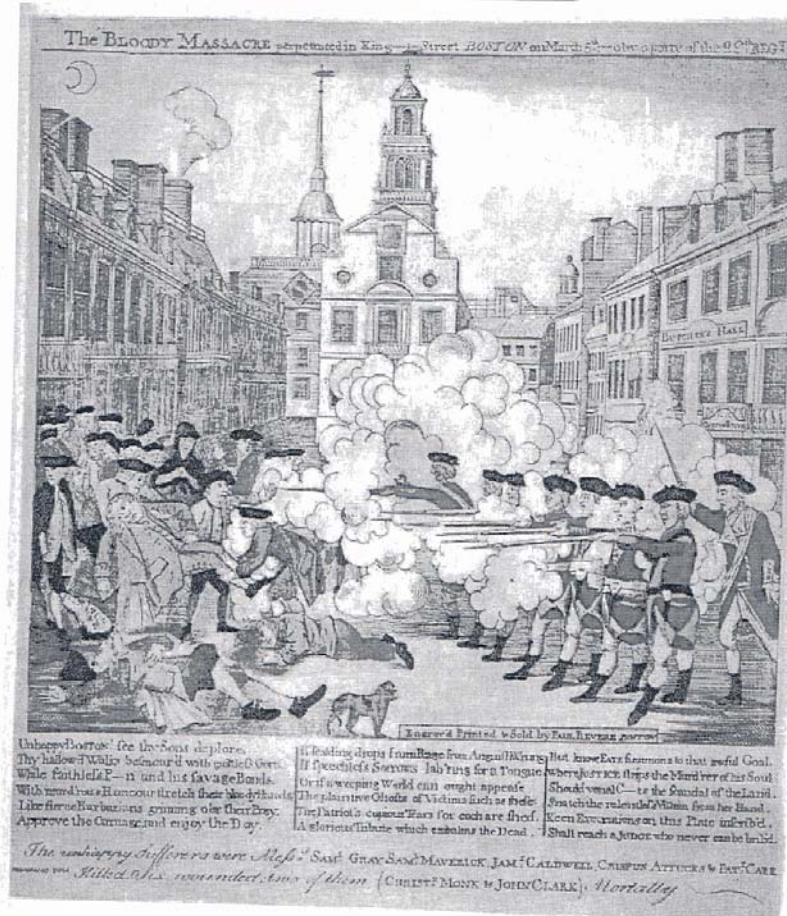
* Resources marked with an asterisk indicate county curriculum materials. When using county-provided primary sources, Steve often modified them to reflect his goals and meet the needs of his students.

Appendix N

Steve's Boston Massacre Documents and Assignment

Source One

Paul Revere



This engraving of the Boston Massacre is by Paul Revere, an American patriot and silversmith. He became a hero at the beginning of the American Revolution when he rode from Charlestown to Lexington on the night of April 18, 1775, to warn the countryside of the British troops. Revere is remembered as a craftsman as much as he is remembered as a Patriot. Note that this engraving shows only the British soldiers armed with weapons.



This drawing of the Boston Massacre is by Henry Pelham, stepbrother of painter John Singleton Copley. Pelham drew his picture before Paul Revere's, but it was published two weeks after Revere's. Henry Pelham was a Loyalist, he studied engraving and painting, and moved to London in 1776. Note that Pelham shows both sides armed with weapons - see detail at left. Pelham also showed Crispus Attucks being killed. Attucks was a free African American and is considered the first person killed for the cause of freedom in what would later be called the United States.

Name:

Date:

Period:

Was the Boston Massacre a "massacre"?

Directions: Read the following accounts of what happened during the Boston Massacre and consider the similarities and differences between the accounts.

Source 3: Sworn Deposition of Captain Thomas Preston

The mob still increased, and more outrageous, striking their clubs or bludgeons one against another, and calling out, "come on you rascals, you bloody backs, you lobster scoundrels, fire if you dare, fire and be damned, we know you dare not," and much more such language was used. They advanced to the points of the bayonets, struck some of them and even the muzzles of the pieces. Some well-behaved persons asked me if the guns were charged. I replied yes. They then asked me if I intended to order the men to fire. I answered no. While I was thus speaking, one of the soldiers having received a severe blow with a stick, stepped a little on one side and instantly fired. I turned to ask asked him why he fired without orders. I was then struck with a club on my arm, which for some time deprived me of the use of it, which had it been placed on my head, most probably would have destroyed me. On this general attack was made on the men by a great number of heavy clubs and snowballs being thrown at them, by which all our lives were in imminent danger. Instantly three or four of the soldiers fired in the confusion and hurry. The mob then ran away, except three unhappy men who instantly expired. On asking the soldiers why they fired without orders, they said they heard the word fire and supposed it came from me. This might be the case as many of the mob called out fire, but I assured the men I gave no such order; that my words were don't fire, stop your firing.

Source 4: Trial Testimony of Bostonian Robert Goddard

The Captain told the people to go home least there should be murder done. They were throwing snowballs. The Captain was behind the soldiers. The Captain told them to fire. One gun went off. A sailor or townsman struck the Captain. He thereupon said "damn your bloods fire think I'll be treated in this manner." This man that struck the Captain came from among the people who were seven feet off. After the Captain said "damn you bloods fire" they all fired one after another about seven or eight in all, and then the officer told them to load again. He stood behind all the time. I was so near the officer when he gave the word fire that I could touch him. His face was towards me. He stood in the middle behind the men. I looked him in the face. When he said fire he turned about to me. I looked him in the face.

Name:

Date:

Period:

Boston Massacre—Massacre or Not?

Directions: Complete the following chart for each of the four pieces of historical evidence you examine to determine if the Boston Massacre was a massacre or not. You will use this evidence to help you write a paragraph in which you provide your own interpretation of the focus question.

Source	Author/Artist	Does this source make it seem like the Boston Massacre was a massacre?	What evidence from the source supports your view for the previous column? (Use a direct quote or paraphrase)
1 Engraving of the Boston Massacre by Paul Revere	Paul Revere—patriot and well-known Revolutionary War hero		
2			
3			
4			

Name:

Date:

Period:

Was the Boston Massacre a "massacre" or not?

Directions: Now that you have carefully examined four pieces of historical evidence surrounding the Boston Massacre, it is now time for you to provide your own interpretation to the question above. You will write a well-developed paragraph in which you state your position as to the focus question: "Was the Boston Massacre a 'massacre' or not?"

I will be looking for the following when grading your paragraph:

- You have included a strong opening statement in which you clearly state your opinion on the focus question.
- Your paragraph is 5-6 sentences at a *minimum*.
- You use evidence from at least two of the four sources to support your opinion. (You may use direct quotes or paraphrase from the document, and provide a descriptive explanation if you use a painting.)
- Provide an explanation of why the evidence you chose is most convincing—in other words—why is the evidence you chose to cite reliable? (This can include a statement about the creator of the evidence and his or her reliability as a witness to the event.)

Due: Friday, September 26; Deadline: Wednesday, October 1

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Appendix O

Steve's Lexington Green Inquiry Activity

Lexington Green: What happened and why does it matter?

Page – 1

Engagement

Major Pitcairn screamed at us: "Lay down your arms, you lousy bastards! Disperse, you lousy peasant scum!"...At least, those were the words that I seem to remember. Others remembered differently; but the way he screamed, in his strange London accent, with the motion and excitement, with his horse rearing and kicking...with the drums beating again and the fixed bayonets glittering in the sunshine, it's a wonder that any of his words remain with us...We still stood in our two lines, our guns butt end on the ground or held loosely in our hands. Major Pitcairn spurred his horse and raced between the lines. Somewhere, away from us, a shot sounded. A redcoat soldier raised his musket, leveled it at Father, and fired. My father clutched at his breast, then crumpled to the ground like an empty sack...Then the whole British front burst into a roar of sound and flame and smoke.

Excerpt from the novel, *April Morning*, by Howard Fast (1961)

Background

By April 1775, the Patriots of Massachusetts had been pushing for independence for well over a year. They had suffered the most under the Intolerable Acts and their Committees of Observation for enforcing boycotts of British goods were much stronger than the other colonies. The Massachusetts Committees of Observation had gathered muskets, were running courts, and begun to take over some parts of the government. General Gage, the British commander, had a plan to secretly sneak out of Boston to destroy the weapons and hopefully capture Patriot leaders like Sam Adams and John Hancock. However, through a spy, the Patriots learned of the British plan. Paul Revere rode out to warn patriot militia. Early on April 19, the first British soldiers marched into the Green in Lexington. A group of well armed Patriots stood at the far end of the Green.

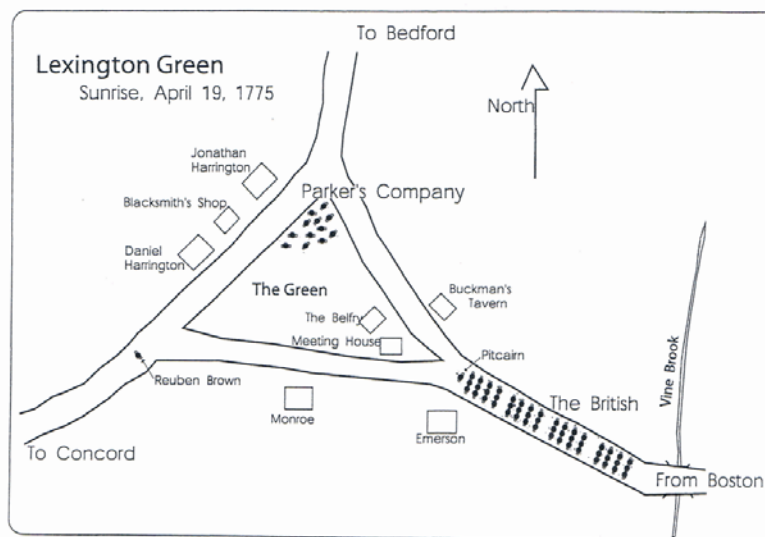
Focus Questions

- *What happened on Lexington Green?*
- *How did it affect the movement for independence?*

Predictions

What do you think people from the following points of view say happened on Lexington Green?

- Eyewitness: An American colonist - Patriot
- Eyewitness: An American colonist - Loyalist
- Eyewitness: A British Officer
- Second hand observer: A British Newspaper
- Second hand observer: An American historian two hundred years later.

Source One**The Map**

Source: Developed by Montgomery County Public Schools, July 2004, based on several different historical sources

Source Two**British Officer**

19th. At 2 [AM] we began our march by wading through a very long ford up to our middles; after going a few miles we took three or four people who were going off to give intelligence; about five miles on this side of a town called Lexington, which lay in our road, we heard there were some hundreds of people collected together intending to oppose us and stop our going on; at 5 [AM] we arrived there, and saw a number of people, I believe between 200 and 300, formed in a common in the middle of the town; we still continued advancing, keeping prepared against an attack though without intending to attack them; but on our coming near them they fired one or two shots, upon which our men without any orders, rushed in upon them, fired and put them to flight; several of them were killed, we could not tell how many, because they were got behind walls and into the woods; We had a man of the 10th light Infantry wounded, nobody else hurt. We then formed on the Common, but with some difficulty, the men were so wild they could hear no orders; we waited a considerable time there, and at length proceeded on our way to Concord.

Source: Entry for April 19th, 1775 from the diary of Lieutenant John Barker, an officer in the British army

Source Three The Minutemen

WE NATHANIEL MULLIKEN, PHILIP RUSSELL, [followed by the names of thirty -two other men present on Lexington Green on April 19, 1775]...all of lawful age, and inhabitants of Lexington, in the County of Middlesex, ...do testify and declare, that on the nineteenth of April instant, about one or two o'clock in the morning, being informed that...a body of regulars were marching from Boston towards Concord, ...we were alarmed and having met at the place of our company's parade [Lexington Green], were dismissed by our Captain, John Parker, for the present, with orders to be ready to attend at the beat of the drum, we further testify and declare, that about five o'clock in the morning, hearing our drum beat, we proceeded towards the parade, and soon found that a large body of troops were marching towards us, some of our company were coming up to the parade, and others had reached it, at which time the company began to disperse, whilst our backs were turned on the troops, we were fired on by them, and a number of our men were instantly killed and wounded, not a gun was fired by any person in our company on the regulars to our knowledge before they fired on us, and they continued firing until we had made all our escape.

Source: Lexington, April 25th, 1775. Nathaniel Mulliken, Philip Russell, (and the other 32 men), duly sworn on April 25th before three justices of the peace.

Source Four London Newspaper

Lieutenant Nunn, of the Navy arrived this morning at Lord Dartmouth's and brought letters from General Gage, Lord Percy, and Lieutenant-Colonel Smith, containing the following particulars of what passed on the nineteenth of April last between a detachment of the King's Troops in the Province of Massachusetts-Bay and several parties of rebel provincials...Lieutenant-Colonel Smith finding, after he had advanced some miles on his march, that the country had been alarmed by the firing of guns and ringing of bells, dispatched six companies of light-infantry, in order to secure two bridges on different roads beyond Concord, who, upon their arrival at Lexington, found a body of the country people under arms, on a green close to the road; and upon the King's Troops marching up to them, in order to inquire the reason of their being so assembled, they went off in great confusion, and several guns were fired upon the King's troops from behind a stone wall, and also from the meeting-house and other houses, by which one man was wounded, and Major Pitcairn's horse shot in two places. In consequence of this attack by the rebels, the troops returned the fire and killed several of them. After which the detachment marched on to Concord without anything further happening.

Source: Newspaper account from, *The London Gazette*, June 10, 1775

Source Five College President

There is a certain sliding over and indeterminateness in describing the beginning of the firing. Major Pitcairn who was a good man in a bad cause, insisted upon it to the day of his death, that the colonists fired first...He does not say that he saw the colonists fire first. Had he said it, I would have believed him, being a man of integrity and honor. He expressly says he did not see who fired first; and yet believed the peasants began. His account is this-that riding up to them he ordered them to disperse; which they not doing instantly, he turned about to order his troops so to draw out as to surround and disarm them. As he turned he saw a gun in a peasant's hand from behind a wall, flash in the pan without going off; and instantly or very soon two or three guns went off by which he found his horse wounded and also a man near him wounded. These guns he did not see, but believing they could not come from his own people, doubted not and so asserted that they came from our people; and that thus they began the attack. The impetuosity of the King's Troops were such that a promiscuous, uncommanded but general fire took place, which Pitcairn could not prevent; though he struck his staff or sword downwards with all earnestness as a signal to forbear or cease firing. This account Major Pitcairn himself gave Mr. Brown of Providence who was seized with flour and carried to Boston a few days after the battle; and Gov. Sessions told it to me.

Source: From the diary of Ezra Stiles president of Yale College, entry for August 21 1775

Source Six Young British Officer

To the best of my recollection about 4 o'clock in the morning being the 19th of April the 5 front companies was ordered to load which we did...It was at Lexington when we saw one of their companies drawn up in regular order. Major Pitcairn of the Marines second in command called to them to disperse, but their not seeming willing he desired us to mind our space which we did when they gave us a fire then run off to get behind a wall. We had one man wounded of our Company in the leg, his name was Johnson, also Major Pitcairn's horse was shot in the flank; we returned their salute, and before we proceeded on our march from Lexington I believe we killed and wounded either 7 or 8 men.

Source: Ensign Jeremy Lister, youngest of the British officers at Lexington, in a personal narrative written in 1782

Source Seven**Patriot Leader**

FRIENDS AND FELLOW SUBJECTS: Hostilities are at length commenced in the Colony by the troops under command of General Gage; and it being of the greatest importance that an early, true, and authentic account of this inhuman proceeding should be known to you, the Congress of this Colony have transmitted the same, and from want of a session of the honorable Continental Congress, think it proper to address you on the alarming occasion.

By the clearest depositions relative to this transaction, it will appear that on the night preceding the nineteenth of April instant...the Town of Lexington...was alarmed, and a company of the inhabitants mustered on the occasion; that the Regular troops, on their way to Concord, marched into the said town of Lexington; and the said company, on their approach, began to disperse; that notwithstanding this, the regulars rushed on with great violence, and first began hostilities by firing on said Lexington Company, whereby they killed eight and wounded several others; that the Regulars continued their fire until those of said company, who were neither killed nor wounded, had made their escape.

These, brethren, are marks of ministerial vengeance against this colony, for refusing, with her sister colonies, a submission to slavery. But they have not yet detached us from our Royal Sovereign. We profess to be his loyal and dutiful subjects, and so hardly dealt with as we have been, are still ready, with our lives and fortunes, to defend his person, family, crown, and dignity. Nevertheless, to the persecution and tyranny of his cruel ministry we will not tamely submit; appealing to Heaven for the justice of our cause, we determine to die or be free.

Source: Joseph Warren, President pro tem of the Massachusetts Provincial Congress, in a cover letter for 21 sworn depositions about the events at Lexington and Concord sent to Benjamin Franklin, the colonial representative in London.

Source Eight**American Textbook**

In April 1775, General Gage, the military governor of Massachusetts, sent out a body of troops to take possession of military stores at Concord, a short distance from Boston. At Lexington, a handful of "embattled farmers," who had been tipped off by Paul Revere, barred the way. The "rebels" were ordered to disperse. They stood their ground. The English fired a volley of shots that killed eight patriots. It was not long before the swift-riding Paul Revere spread the news of this new atrocity to the neighboring colonies. The patriots of all New England, although still a handful, were now to fight the English.

Source: from *The United States: Story of a Free People*, by S. Steinberg, Published Allyn & Bacon (1963)

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What happened on Lexington Green?

Who is Most Reliable?

Directions: During class discussions record short hand versions of the answers for each source. Where the source does not really answer the questions write NA for not applicable. After class discussions rate each source for its reliability from 1 to 4. 1 = not reliable, 4 = very reliable. Conclude by answering, who is most reliable?

SOURCE	A How many?	B Why each on Green?	C What happened before shots?	D Who Fired First?	E What happened next?	F # Wounded and killed?
1. The Map 1 2 3 4						
2. Lieutenant Barker, British Officer 1 2 3 4						
3. The Minutemen 1 2 3 4						
4. The London Newspaper 1 2 3 4						
5. Ezra Stiles, College President 1 2 3 4						
6. Ensign Lister, Young Brit. Officer 1 2 3 4						
7. Joseph Warren, Patriot Leader 1 2 3 4						
8. American Textbook, 1963 1 2 3 4						

Appendix P

Steve's Mexican American War Inquiry Activity

Name: _____ Date: _____ Per: _____

"Mexican-American War" or "US Invasion of Mexico"? Which Label Should Live on in the History Books?

You have been asked by the Houghton Mifflin Company to serve as a guest editor of *Creating America*. You have conducted extensive research into the question above by examining a wealth of historical accounts pertaining to the war with Mexico.

Now it is time to convince the Houghton Mifflin Company, who produces the textbook, to change the title for Chapter 13 Section 3 to one of the labels above. Your task is to write a letter to the textbook company convincing them that the label you chose is the proper one for this section. It will not be an easy sell—you will have to use direct evidence from the documents you analyzed during your research to support your argument.

Your letter to the textbook company should contain the following parts:

- An introductory paragraph in which you state which label you believe is proper for the war and briefly explain your reasoning for choosing that label
- Additional paragraphs in which you use direct evidence from three documents to support your choice. You must adequately explain how the documents you cite support your choice of a label for the war.
- A conclusion paragraph that reinforces your argument.
- Proper business-letter format so Houghton Mifflin takes you seriously.

Below are the tasks you will complete as you write your letter.

Task One: Use the graphic organizer on the back of this page as you pre-write. Think of three reasons that support your choice for the label and three quotes from the documents that serve as direct evidence.

Task Two: View the attached handout for proper business-letter format. Make sure you use this format as you begin to write your letter.

Task Three: Write your letter to Houghton Mifflin and use the attached rubric to make sure you have included everything you have been asked to include.

Pre-Writing Graphic Organizer

	Chosen Label:
	Reason #1:
	Direct Evidence (Quote) Including Source Info:
	Reason #2:
	Direct Evidence (Quote) Including Source Info:
	Reason #3:
	Direct Evidence (Quote) Including Source Info:

Business Letter Rubric

Name: _____ Period: _____

Scoring Criteria	Points Possible	Points Earned
Introductory Paragraph: Clearly states chosen label for the war with Mexico and includes a brief overview of why this label is appropriate	5	
Three Reasons to Support Chosen Label: Clearly defined and explained reasons why the label you chose is most appropriate for the war	5 each=15	
Three Pieces of Direct Evidence: Include three direct quotations or paraphrased excerpts from the documents in support; identifies the source information for each piece of evidence	5 each=15	
Concluding Paragraph: Clearly sums up your argument and reasserts the reasoning behind your choice of label	5	
Proper Business Letter Format: See attached example.	5	
Spelling/Grammar: Limited mistakes	5	

“Mexican-American War” or “US Invasion of Mexico”?

Document A: President James K. Polk’s Speech Asking for a Declaration of War Against Mexico, 1846

Background: Historians agree that President Polk was very much interested in acquiring the territory disputed with Mexico. Polk had been already working on a war message to Congress when news arrived on April 25, 1846, that Mexican troops had crossed the Rio Grande and clashed with General Taylor’s army. (Note: In the following selection “Rio Del Norte” refers to the Rio Grande).

The strong desire to establish peace with Mexico...[convinced] me in September last to seek the reopening of diplomatic relations between the two countries.... The Mexican government not only refused . . . but, after a long continued series of menaces, have at last invaded our territory, and shed the blood of our fellow-citizens on our own soil....

I had ordered an efficient military force to take a position "between the Nueces and the Del Norte." This had become necessary, to meet a threatened invasion of Texas by the Mexican forces... The Congress of Texas, by its act of December 19, 1836, had declared the Rio del Norte to be the boundary of that republic. Its jurisdiction had been extended and exercised beyond the Nueces....

Our own Congress had . . . by the act [of annexation] approved December 31, 1845, recognized the country beyond the Nueces as a part of our territory....The Mexican forces, on the twelfth of April, . . . notified General Taylor to break up his camp within twenty-four hours, and to retire beyond the Nueces river. But now, after reiterated menaces, Mexico has passed the boundary of the United States, has invaded our territory, and shed American blood upon American soil. I invoke the prompt action of Congress to recognize the existence of war....

Discussion: According to Polk, who established the southern boundary of Texas at the Rio Del Norte (Rio Grande)? Did Mexico agree with this boundary?

“Mexican-American War” or “US Invasion of Mexico”?

Document B: Excerpt from Mexican History Textbook

Background: The following selection is from a Mexican textbook about the war with Mexico.

The skill and treachery of the American government

... Texas was annexed to the United States by the treaty of April 12, 1844, despite the protests of our government and even though the treaty was rejected by the American Congress. Thereupon the [American] annexation of the territory [Texas] was proposed in the House and approved on March 1, 1845.... The Texans, backed by the American government, claimed that its boundaries extended to the Rio Bravo del Norte [Rio Grande], whereas in fact the true limits had never passed the Nueces River. From this [boundary dispute] a long controversy developed.... They ordered troops to invade places within our territory, operating with the greatest treachery, and pretended that it was Mexico which had invaded their territory, making [Mexico] appear as the aggressor. What they were really seeking was to provoke a war, a war in which the southern states of the Union were greatly interested, in order to acquire new territories which they could convert into states dominated by the slavery.... But since the majority of the people of the United States were not pro-slavery nor favorable of a war of conquest, President Polk tried to give a defensive character to his first military moves.... Once he obtained a declaration of war, Polk made it appear that he wanted nothing more than peaceful possession of the annexed territory. When at last the city of Mexico was captured, he made his fellow-countrymen understand that [Mexico would pay for American deaths by signing over vast amounts of territory to the US government]. Thus Polk would achieve the goal he sought from the outset....

Discussion: According to the textbook, what was Polk's goal from the outset of the conflict with Mexico? How did he assure that public opinion would remain in favor of the war?

“Mexican-American War” or “US Invasion of Mexico”?

Document C: Abraham Lincoln’s “Spot Resolutions,” 1847

Background: On December 22, 1847, Abraham Lincoln appeared before the US House of Representatives and issued this statement requesting that President Polk provide Congress with the exact location where the Mexican army “shed the blood of our fellow-citizens on our own [American] soil...” Lincoln, then a Whig Representative from Illinois, became an outspoken critic of President Polk’s conduct during the war with Mexico.

Speech Before the United States House of Representatives, 22 December 1847

Whereas the President of the United States, in his message of May 11, 1846, has declared that “the Mexican Government ...has at last invaded *our territory* and shed the blood of our fellow-citizens on our *own soil*.”

And whereas this House [desires] to obtain a full knowledge of all the facts which go to establish whether the particular spot on which the blood of our citizens was so shed was or was not at that time *our own soil*: Therefore,

Resolved By the House of Representatives, That the President of the United States be respectfully requested to inform this House --

1st. Whether the spot on which the blood of our citizens was shed, as in his messages declared, was or was not within the territory of Spain, at least after the treaty of 1819, until the Mexican revolution.

2d. Whether that spot is or is not within the territory which was wrested from Spain by the revolutionary Government of Mexico.

5th. Whether the people of that settlement, or a majority of them, or any of them, have ever submitted themselves to the government or laws of Texas or the United States....

7th. Whether our *citizens*, whose blood was shed, as in his message declared, were or were not, at that time, armed officers and soldiers, sent into that settlement by the military order of the President, through the Secretary of War.

8th. Whether the military force of the United States was or was not sent into that settlement after General Taylor had more than once [suggested] to the War Department that, in his opinion, no such movement was necessary to the defence or protection of Texas.

Discussion: Why do you think Lincoln emphasized “our territory” and “our soil” in his speech? Why do you think Lincoln is requesting clarification in these matters?

“Mexican-American War” or “US Invasion of Mexico”?

Document E: Proclamation of Commander John Sloat at Monterey, California, 1846

Background: Shortly after war broke out with Mexico, Commander John Sloat was ordered to attack western Mexico via the Pacific Ocean. The following proclamation was posted for the residents of the Mexican city of Monterey, California

TO THE INHABITANTS OF CALIFORNIA

The central government of Mexico having commenced hostilities against the United States of America, by invading its territory and attacking the troops of the United States stationed on the north side of the Rio Grande, and with a force of seven thousand men... [that] was totally destroyed... by an [American] force of two thousand three hundred men, under the command of General Taylor... I shall hoist the [flag] of the United States at Monterey immediately, and shall carry it throughout California.

I declare to the inhabitants of California, that although I come in arms with a powerful force, I do not come among them as an enemy to California; on the contrary, I come as their best friend - as henceforward California will be a portion of the United States....

Under the flag of the United States California... will rapidly advance and improve both in agriculture and commerce....

All persons holding titles to real estate, or in quiet possession of lands under a color of right, shall have those titles and rights guarantied to them.

All churches, and the property they contain, in possession of the clergy of California, shall continue in the same rights and possessions they now enjoy.

JOHN D. SLOAT, Commander-in-chief of the United States naval forces in the Pacific ocean. United States Flag-ship Savannah, Harbor of Monterey, July 7, 1846.

Discussion: Does Commander Sloat's proclamation support or reject the idea that the US war with Mexico was a war of "conquest"? Does Commander Sloat believe it to be a war of conquest or defense?

“Mexican-American War” or “US Invasion of Mexico”?

Document F: Letter to the Editor, *The Enquirer*, Richmond VA., November 2, 1846

Background: The outbreak of war with Mexico was not popular with all of the American public. Some northerners saw the war as a massive conspiracy orchestrated by the southern states to retrieve more US territory that could be open to slavery. Other war opponents called the conflict the “President’s War,” suggesting that it was fought to satisfy President Polk’s own personal interests in expansion. The writer of this letter to the editor has a different take on the cause of the conflict.

...the causes of war have been denounced by the Whig press. All remember the violent [argument] that occurred upon the [declaration of war with Mexico]— how the Whigs [claimed] the President as having himself produced the war, for...personal or political [gain]— how it was [denounced] as the “President’s war.” Still, the...majority of Democrats and Whigs [in Congress recognized] the existence of the war...as having been begun by Mexico herself.

But, says the Republican [war opponent], “will the *Enquirer* deny that it was the march to that point [the Rio Grande] which provoked hostilities, the invasion of a territory which the Mexicans considered their own...? If the American forces had [not moved south to the Rio Grande] it is probable that not a single hostile gun would have been fired...and hundreds of valuable lives...been preserved....”

We dissent entirely from such conclusions. — We are satisfied that the Mexican rulers had resolved upon the re-conquest of Texas, long before the march of our troops to the Rio Grande and [started] the war...because we had dared to [annex] Texas....

Discussion: What does this document suggest caused Mexico to attack the US?

Name: _____

Date: _____

Period: _____

"Mexican-American War" or "US Invasion of Mexico?"

Directions: Complete the following chart as you analyze each document.

Document	Source: Author, Date, type of document	"Mexican-American War" or "US Invasion of Mexico?"	Explain your reasoning for your choice in the last column and provide a quote from document that supports your choice.	Reliability: What are the pros and cons of using this source as an historical account?
A			Quote:	Pros: Cons:
B			Quote:	Pros: Cons:
C			Quote:	Pros: Cons:

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Document	Source: Author, Date, type of document	"Mexican-American War or 'US Invasion of Mexico'?"	Explain your reasoning for your choice in the last column and provide a quote from document that supports your choice.	Reliability: What are the pros and cons of using this source as an historical account?
D			<p>Quote:</p>	<p>Pros:</p> <p>Cons:</p>
E			<p>Quote:</p>	<p>Pros:</p> <p>Cons:</p>
F			<p>Quote:</p>	<p>Pros:</p> <p>Cons:</p>

Appendix Q

Overview of Bryan's Imperialism Unit: Topics, Resources, and Activities

	Lesson Topic	Resources	Activities
Day 1	Foreign policy objectives	Handouts on foreign policy objectives*	1) Warm-up: Multiple choice questions to review content 2) Students work to complete district handouts (matching exercise and timeline) 3) Exit question asked verbally to class: What objectives and beliefs led America to become a world power?
Day 2	Foreign policy objectives Imperialism in the United States	6 primary sources about imperialism* Document chart*	1) Warm-up: multiple choice questions on policy objectives 2) Class reads document 1 together and completes chart 3) Students work in teams to read through 1 of the remaining documents and complete chart. 4) Students jigsaw to share their assigned document's information.
Day 3	Imperialism Spanish American War	Video clip, textbook reading, and handout on reading edited historical documents** Guide for taking Cornell notes	1) Warm-up: multiple choice questions 2) Teams share information from assigned imperialism document (day 2 activity). 3) Teacher introduces inquiry question: Why did the U.S. invade Cuba? Plays video clip and reviews Cornell notes handout. 4) Teacher reviews "Parts of an Edited Historical Document." 5) Students read textbook excerpt and underline evidence to answer inquiry question. 6) Exit question: teacher asks

			students about foreign policy objectives.
Day 4	Spanish American War	5 primary source documents** Document chart**	<p>1) Warm-up: Teams write evidence from textbook excerpt on board in response to inquiry question.</p> <p>2) Class reads through document A together. Teacher leads students through identification of evidence and review of sourcing information.</p> <p>3) Students split into teams to read assigned documents (B, C, D, or E), answer reading questions, and write document information on poster paper (source info, causes, evidence).</p>
Day 5	Spanish American War	8 primary source documents** Document chart**	<p>1) The class reviews each group's poster for assigned document (B, C, D, E) from yesterday's class.</p> <p>2) Each group reads a second assigned document (F, G, H, I) and identifies source, causes of invasion, and evidence to support causes.</p>
Day 6	Spanish American War	9 primary source documents** Document chart** Graphic organizer for essay assignment	<p>1) The class reviews students' hypotheses for U.S. invasion of Cuba.</p> <p>2) Students work in their teams to finalize their posters for assigned documents (F, G, H, or I).</p> <p>3) Class reviews source, causes, and evidence for each document and complete document chart.</p> <p>4) Teacher distributes essay assignment and graphic organizer to scaffold writing process. Students must agree</p>

			<p>or disagree with statement: “The explosion of the U.S.S. Maine caused the United States to invade Cuba in 1898.”</p> <p>5) Students answer question #1 on graphic organizer: “Do you agree with this explanation of the causes of the Spanish American War? Why or why not?”</p>
Day 7	Spanish American War	9 primary source documents** Graphic organizer for essay assignment	<p>1) Warm-up: multiple choice questions to review for midterm exam</p> <p>2) Teacher reviews essay prompt and question #1 on graphic organizer.</p> <p>3) Teacher reviews thesis writing and evidence with students. Students answer questions #2 and #3 on graphic organizer.</p> <p>4) Students write thesis statements and identify evidence for essay.</p> <p>5) Students share their thesis statements and evidence in pairs.</p> <p>6) Students begin to write their essays.</p>
Day 8	Spanish American War	9 primary source documents** Document chart** Graphic organizer	<p>1) Students write essays.</p>

* County curriculum materials

** Materials from Historical Thinking Matters online resource

Appendix R

Overview of Bryan's World War II Unit: Topics, Resources, and Activities

	Topics	Resources	Activities
Day 1	Introduction to World War II The "common good"	"Common good" scenarios* WWII images	1) Students read common good scenarios in teams and answer questions. 2) Teams share main ideas of scenarios with class. 3) Students complete pre-assessment: image analysis
Day 2	Hitler's rise to power U.S. isolationism to involvement	Dr. Seuss political cartoon NY Times article- Hitler's rise to power 4 primary source documents: isolationism vs. involvement Graphic organizer	1) Warm-up: Students analyze political cartoon. 2) Class reads and discusses NY Times article. 3) Students read 1 primary source document in teams and complete graphic organizer.
Day 3	U.S. isolationism to involvement	Dr. Seuss political cartoon 4 primary source documents from day 2 Chamberlain video clip 4 primary source documents (FDR) and graphic organizer	1) Warm-up: Students analyze political cartoon. 2) Students share information about documents from day 2 activity. 3) Students work in teams to read 1 assigned FDR document and complete graphic organizer. 4) Class begins to review 2 of the documents.
Day 4	U.S. isolationism to involvement	4 primary source documents (FDR) and graphic organizer	1) Students read remaining documents from day 3 activity independently and complete rest of graphic organizer. 2) Students share info from graphic organizers on board. Teacher adds information to chart during discussion.
Day 5	Pearl Harbor U.S. War Strategy	Dr. Seuss political cartoon Primary source	1) Warm-up: Students analyze Dr. Seuss political cartoon 2) Class reads and discusses

		document: Mortensen and USS Oklamhoma* Video clip: Pearl Harbor and life on the home front War strategy handouts*	Mortensen account of USS Oklahoma. 3) Teacher shows video clip about Pearl Harbor and life on the home front 4) Teacher introduces war strategy activity and reviews the “Pacific Theatre.”
Day 6	U.S. War Strategy	War strategy handouts* War fronts video clip	1) Warm-up: Students answer 3 multiple choice questions. 2) Teacher reviews Pacific Theatre war strategy and impact on common good. 3) Students work in their groups on 1 of 4 remaining “theatres” and complete graphic organizer. 4) Groups share their information with the rest of the class. 5) Teams work together to fill in gaps on graphic organizer. 6) Teacher shows brief video clip about Churchill, FDR, and the war fronts.
Day 7	U.S. War Strategy	War strategy handouts* <i>Turning Points in the Pacific</i> reading*	1) Warm-up: Students answer 3 multiple choice questions 2) Teams decide on their top 3 war strategies, and the teacher tallies the class votes on the board. 3) Students read county text about U.S. chosen strategy. 4) Teacher gives students notes on 4 chosen strategies. 5) Class reads <i>Turning Points</i> article. 6) Students write response to exit question: What strategies did the U.S. use to win the war?
Day 8	U.S. Propaganda	30-40 propaganda posters	1) Warm-up: Students answer 3 multiple choice questions

		Graphic organizer	<p>2) Teacher guides students through analysis of “Loose Lips” propaganda poster.</p> <p>3) Students work in pairs to analyze propaganda posters and complete graphic organizer at 10 work stations. Each station contains 3-4 posters representing one particular theme.</p> <p>4) Students answer the exit question at the bottom of their graphic organizer.</p>
Day 9	Life on the home front	Roosevelt primary source Skit about rationing*	<p>1) Warm-up: Students answer 4 multiple choice questions.</p> <p>2) Teacher discusses with students their previous writing assignment (strengths and weaknesses).</p> <p>3) Class reads primary source by FDR about sacrificing on the home front.</p> <p>4) Students read through skit about rationing.</p> <p>5) Teacher assigns formative writing assignment about sacrifice during WWII. Students are to use at least 1 example from 2 readings today.</p>
Day 10	Life on the home front	Political cartoon 6 primary source documents Graphic organizer Video clip	<p>1) Warm-up: Students analyze political cartoon and answer questions.</p> <p>2) Teacher reviews sacrificing on the home front from day 9 and plays a video clip from Discovery Learning.</p> <p>3) In groups, students read 1 primary source about African Americans, Japanese Americans, or women on the home front during WWII. Students highlight main ideas and complete graphic</p>

			<p>organizer.</p> <p>4) Students write information about their assigned document on the board, and the teacher reviews all 6 documents with the class.</p>
Day 11	Life on the home front	<p>1 primary source</p> <p>1 curriculum reading*</p> <p>Graphic organizer</p>	<p>1) Class reads county reading (conversation between Randolph and FDR). Teacher reviews answers to questions on graphic organizer.</p> <p>2) Teacher reviews document (about Japanese American woman) that students were to read for homework. Teacher reviews answers to questions on graphic organizer.</p> <p>3) Teacher assigns writing assignment for homework in which students are to use at least 2 pieces of evidence from 8 documents to answer question.</p> <p>4) Students take quiz- 10 multiple choice questions and 4 short answer.</p>
Day 12	Decision to drop the atomic bomb	<p>6 short excerpt from primary sources (2 are from the county curriculum*)</p> <p>Graphic organizer</p>	<p>1) Class reads 1st document together. The teacher asks students questions and they complete the 1st part of their graphic organizer.</p> <p>2) Teacher assigns 1 document to each team (documents 2-5); students read and complete corresponding part of graphic organizer.</p> <p>3) The teacher reviews the documents with the class and students complete the graphic organizer for remaining documents.</p> <p>4) The class reads and discusses document #6.</p>

Day 13	Outcomes/aftermath of WWII	9 primary sources Graphic organizer	<p>1) Warm-up: Students answer 3 multiple choice questions.</p> <p>2) Class reads 1st document together and answers 3 questions on graphic organizer.</p> <p>3) Students work in teams or partners to read 1 primary source together and complete graphic organizer.</p> <p>4) Class reviews first set of 4 documents.</p> <p>5) Students work in teams or partners to read 2nd assigned document.</p> <p>6) Class reviews second set of 4 documents using chart on the board.</p>
Day 14	Review of WWII content	Socratic Seminar handout Quiz from day 11 Review sheet for exam	<p>1) Teacher reviews expectations and handout for Socratic seminar. Students are to bring 2 resources from the unit for the seminar discussion.</p> <p>2) Students answer 2 multiple choice questions.</p> <p>3) Teacher reviews answers to quiz students completed on day 11.</p>
Day 15	How does the common good change in times of crisis?	Socratic seminar discussion guide and reflection sheet Review sheet for exam	<p>1) Warm-up: Students answer 2 multiple choice questions.</p> <p>2) Socratic seminar: Students discuss the unit essential question, “how does the common good change in times of crisis?”</p> <p>3) Review for exam: students work in teams to complete review sheet. The teacher awards points to teams with correct answers.</p>

* County curriculum materials.

Appendix S

Bryan's Spanish American War Inquiry Documents and Chart (from Historical Thinking Matters website)

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SPANISH AMERICAN WAR



SPANISH AMERICAN WAR

TEXTBOOK

War Fever Escalates

In 1896, Spain responded to the Cuban revolt by sending General Valeriano Weyler to Cuba to restore order. Weyler tried to crush the rebellion by herding the entire rural population of central and western Cuba into barbed wire concentration camps. Here civilians could not give aid to rebels. An estimated 300,000 Cubans filled these camps, where thousands died from hunger and disease.

Headline Wars Weyler's actions fueled a war over newspaper circulation that had developed between the American newspaper tycoons William Randolph Hearst and Joseph Pulitzer. To lure readers, Hearst's *New York Journal* and Pulitzer's *New York World* printed exaggerated accounts—by reporters such as James Creelman—of “Butcher” Weyler's brutality. Stories of poisoned wells and of children being thrown to the sharks deepened American sympathy for the rebels. This sensational style of writing, which exaggerates the news to lure and enrage readers, became known as **yellow journalism**.

Hearst and Pulitzer fanned war fever. When Hearst sent the gifted artist Frederic Remington to Cuba to draw sketches of reporters' stories, Remington informed the publisher that a war between the United States and Spain seemed very unlikely. Hearst reportedly replied, “You furnish the pictures and I'll furnish the war.”

The De Lôme Letter American sympathy for “Cuba Libre!” grew with each day's headlines. When President William McKinley took office in 1897, demands for American intervention in Cuba were on the rise. Preferring to avoid war with Spain, McKinley tried diplomatic means to resolve the crisis. At first, his efforts appeared to succeed. Spain recalled General Weyler, modified the policy regarding concentration camps, and offered Cuba limited self-government.

In February 1898, however, the *New York Journal* published a private letter written by Enrique Dupuy de Lôme, the Spanish minister to the United States. A Cuban rebel had stolen the letter from a Havana post office and leaked it to the newspaper, which was thirsty for scandal. The de Lôme letter criticized President McKinley, calling him “weak” and “a bidder for the admiration of the crowd.” The embarrassed Spanish

government apologized, and the minister resigned. Still, Americans were angry over the insult to their president.

The U.S.S. Maine Explodes Only a few days after the publication of the de Lôme letter, American resentment toward Spain turned to outrage. Early in 1898, President McKinley had ordered the *U.S.S. Maine* to Cuba to bring home American citizens in danger from the fighting and to protect American property. On February 15, 1898, the ship blew up in the harbor of Havana. More than 260 men were killed.

At the time, no one really knew why the ship exploded; however, American newspapers claimed that the Spanish had blown up the ship. The *Journal's* headline read "The warship *Maine* was split in two by an enemy's secret infernal machine." Hearst's paper offered a reward of \$50,000 for the capture of the Spaniards who supposedly had committed the outrage.

War with Spain Erupts

Now there was no holding back the forces that wanted war. "Remember the *Maine*!" became the rallying cry for U.S. intervention in Cuba. It made no difference that the Spanish government agreed, on April 9, to almost everything the United States demanded, including a six-month cease-fire.

Despite the Spanish concessions, public opinion favored war. On April 11, McKinley asked Congress for authority to use force against Spain. After a week of debate, Congress agreed, and on April 20 the United States declared war.

Source: *The Americans: Reconstruction to the 21st Century* (California Edition). (2006) Eds. Gerald, Danzer, J. Jorge Klor de Alva, Larry S. Krieger, Louis E. Wilson, and Nancy Woloch. McDougal Littell. pp. 347-8.



Modified Document A: *New York Journal*

Purchased by William Randolph Hearst in 1895, the Journal published investigative and human interest stories that used a highly emotional writing style and included banner headlines and graphic images.

DESTRUCTION OF THE WAR SHIP MAINE WAS THE WORK OF AN ENEMY

Assistant Secretary Roosevelt Convinced the Explosion of the War Ship Was Not an Accident.

The Journal Offers \$50,000 Reward for the Conviction of the Criminals Who Sent 258 American Sailors to Their Death.

Naval Officers All Agree That the Ship Was Destroyed on Purpose.

NAVAL OFFICERS THINK THE MAINE WAS DESTROYED BY A SPANISH MINE.

George Bryson, the Journal's special reporter at Havana, writes that it is the secret opinion of many people in Havana that the war ship Maine was destroyed by a mine and 258 men were killed on purpose by the Spanish. This is the opinion of several American naval authorities.

The Spaniards, it is believed, arranged to have the Maine drop anchor over a harbor mine. Wires connected the mine to the magazine of the ship. If this is true, the brutal nature of the Spaniards will be shown by the fact that they waited to explode the mine until all the men had gone to sleep.

Spanish officials are protesting too much that they did not do it. Our government has ordered an investigation. This newspaper has sent divers to Havana to report on the condition of the wreck. This newspaper is also offering a \$50,000 reward for exclusive evidence that will convict whoever is responsible.

Assistant Secretary of the Navy Theodore Roosevelt says he is convinced that the destruction of the Maine in Havana Harbor was not an accident. The suspicion that the Maine was purposely blown up grows stronger every hour. Not a single fact to the contrary has been produced.

Source: Excerpt from *New York Journal and Advertiser*, February 17, 1898

Some of the language and phrasing in this document has been modified from the original. The original document can be found on the HTM website, www.historicalthinkingmatters.org.

Sourcing

1. How long after the explosion of the *Maine* was this article written?
2. What does the headline of the article suggest about the newspaper's point of view?

Close Reading

3. Upon what type of evidence does the *New York Journal* base its claims?



Modified Document B: *New York Times*

Established in 1851, the *New York Times* provided investigative coverage of local New York issues and events, as well as national and international news.

MAINE'S HULL WILL DECIDE

Divers Will Inspect the Ship's Hull to Find Out Whether the Explosion Was from the Outside or Inside.

Magazines of War Ships Sometimes Blow Up Because of Too Much Heat Inside — Hard to Blow Up the Magazine from the Outside.

It has been a busy day for the Navy Department. The war ship *Maine* was destroyed in Havana Harbor last night. Officials in Washington and Havana have been sending cables all night long.

Secretary Long was asked whether he thought this was the work of the enemy. He replied: "I do not. I am influenced by the fact that Captain Sigsbee has not yet reported to the Navy Department. It seems he is waiting to write a full report. So long as he has not made a decision, I certainly cannot. I should think from the signs, however, that there was an accident — that the magazine exploded. How that came about I do not know. For the present, at least, no other war ship will be sent to Havana."

Captain Schuley, who knows a great deal about war ships, did not entertain the idea that the *Maine* had been destroyed on purpose. He said that fires would sometimes start in the coal bunkers, and he told of such a fire on board another war ship that started very close to the magazine. The fire became so hot that the heat blistered the steel wall between the fire and the ammunition before the bunkers and magazine were flooded with water to stop the fire. He did not believe that the Spanish or Cubans in Havana had either the information or the equipment necessary to blow up the magazine, while the *Maine* was under guard.

Source: *New York Times*, February 17, 1898.

Some of the language and phrasing in this document has been modified from the original. The original document can be found on the HTM website, www.historicalthinkingmatters.org.

Sourcing

1. How does the date of this article compare with the date on the *New York Journal and Advertiser* article?

Close Reading

2. According to these headlines, what happened to the *Maine*?
3. What kinds of evidence does the *New York Times* include to support its account of the incident?



Modified Document C: *Awake United States!*

This song was rushed into print between the sinking of the Maine on February 16, 1898 and the declaration of war on April 25, 1898.

Eagle soar on high, and sound the battle cry!

1. How proudly sailed the warship Maine,
a Nation's pride, without a stain!
A wreck she lies, her sailors slain.
By two-faced butchers, paid by Spain!

Refrain:

Eagle soar on high,
And sound the battle cry
Wave the starry flag!
In mud it shall not drag!

2. Why does the breeze such sad thoughts bring,
Like murmuring seas the echoes sing?
Why do clouds thus backward roll.
Like wave on wave, on rock on shoal!

3. Awake! Thy Stars and Stripes unfurl,
And shot and shell and revenge hurl!
Though clouds gather, they will go,
and sunlight follow after woe.

Refrain:

Awake! it is no dream;
Do you hear the sailors scream?
Comrades will you go?
Avenge the cruel blow!

And crush their marble heart!

Source: Marie Elizabeth Lamb, *Awake United States!* (New Orleans, LA, 1898).

Some of the language and phrasing in this document has been modified from the original.
The original document can be found on the HTM website, www.historicalthinkingmatters.org.

Sourcing

1. When and where was this song printed?

Close Reading

2. According to this song, what happened to the *Maine*?
3. What emotions are the song's lyrics supposed to evoke? Include an example from the text.



Modified Document D: President McKinley's State of the Union Address

President McKinley went before Congress to ask for a declaration of war against Spain.

The reasons to go to war are these:

First, in the cause of humanity and to put an end to the bloodshed, starvation, and horrible miseries that are now there.

Second, we owe it to our citizens in Cuba to give them protection for life and property which no government there can or will give.

Third, the right to get involved may be justified by the very serious injury to the trade and business of our people, and by the reckless destruction of property and ruin of the island.

Fourth, and this is very important . . . With such a fight waged for years in an island so near us and with which our people have such trade and business relations; when the lives and liberty of our citizens are in constant danger and their property destroyed and themselves ruined; where our trading vessels might be seized by warships of a foreign nation, all these and others are a constant threat to our peace...

I have already sent to Congress the report on the destruction of the battleship *Maine*. The destruction of that noble ship has filled the national heart with horror.

The destruction of the *Maine*, by whatever cause, is an obvious sign that things in Cuba are intolerable. The Spanish government cannot assure safety and security to the American Navy in the harbor of Havana on a mission of peace, and rightfully there. . . .

Source: Excerpt from President William McKinley's War Message to Congress, April 11, 1898.

Some of the language and phrasing in this document has been modified from the original. The original document can be found on the HTM website, www.historicalthinkingmatters.org.

Sourcing

1. What is McKinley's intention in speaking to Congress? What does this suggest about the tone and message that President McKinley might adopt in the speech?

Close Reading

2. McKinley lists four reasons that justify U.S. intervention in Cuba. What are these reasons? Why might McKinley have arranged them in this particular order?

Contextualizing

3. Based on McKinley's speech, describe the state of affairs in Cuba. Find three phrases from the text that support your answer.



Modified Document E: Reconcentration Camps

By the late 1800s, the Spanish were losing control of their colony, Cuba. Concerned about guerilla warfare in the countryside, they moved rural Cubans to "reconcentration" camps where the Spanish claimed they would be better able to protect them. However, people around the world saw newspaper reports that described horrible conditions in the camps for the Cuban people, who were called "reconcentrados." This account was forwarded to Washington, D.C., by Fitzhugh Lee, U.S. Consul-General in Havana, who said its author was "a man of integrity and character."

SIR:

We will tell you what we saw with our own eyes: 460 women and children thrown on the ground, heaped in piles like animals, some in a dying condition, others sick and others dead, dirty and helpless.

Among the many deaths we witnessed, there was one scene impossible to forget. There was a young girl of 18 years, whom we found seemingly lifeless on the ground; on her right-hand side was the body of a young mother, cold and rigid, but with her young child still alive clinging to her dead breast; on her left-hand side was also the corpse of a dead woman holding her son in a dead embrace.

Bodies were piled up, dead and alive, so that it was impossible to take one step without walking over them; it was very dirty, there was little light, air, and water; there was not enough food to live on.

From all this evidence, we think that the number of deaths among the reconcentrados has amounted to 77 percent.

Source: Excerpt from telegram sent by Fitzhugh Lee, U.S. Consul-General in Cuba, November 27, 1897. Havana, Cuba.

Some of the language and phrasing in this document has been modified from the original. The original document can be found on the HTM website, www.historicalthinkingmatters.org.

Sourcing

1. Why might Lee have chosen to send this description to Washington? Check his job responsibilities (see header for Document F) before writing your answer.

Close Reading

2. Notice the graphic descriptions. How do these details about the living conditions affect you as you read? Why might these descriptions be so detailed?

Contextualizing

3. If they could have seen this letter, how do you think people in the U.S. in 1897 might have reacted to this description of the reconcentration camps?



Modified Document F: "Prepared to Move"

Lee was appointed the U.S. Consul-General in Havana, Cuba in 1896 by President Grover Cleveland. He wrote this letter to the Assistant Secretary of State in the U.S. almost three months before the Maine explosion. The consul-general was a government official living in a foreign city charged with overseeing the protection of U.S. citizens and promoting trade. He would make periodic reports to his superiors in the U.S. Department of State.

SIR:

I still think that at least two war ships should be at Key West, prepared to move here at short notice, and that more of them should be sent to Dry Tortugas, and a coal station be established there.

We should do this to protect the Americans on the island and their properties, both of which are objects of the greatest concern to our Government.

FITZHUGH LEE,
Consul-General.

Source: Excerpt from telegram sent by Fitzhugh Lee, U.S. Consul-General in Cuba, December 3, 1897. Havana, Cuba.

Some of the language and phrasing in this document has been modified from the original. The original document can be found on the HTM website, www.historicalthinkingmatters.org.

Sourcing

1. When and where was this letter written? Why might this be important?

Close Reading

2. What two actions does Lee think the U.S. should take?

Contextualizing

3. Look at Lee's reasons for these actions. What does this indicate about U.S. interests in the region?



Modified Document G: Monroe Doctrine

In 1823, President James Monroe made a bold foreign policy speech to Congress that signified a departure from past U.S. isolationism. The principles he laid out in the speech would become known as the "Monroe Doctrine" and would influence policy decisions thereafter.

The American continents are free and independent. They are not to be considered as subjects for future colonization by Europe.

The citizens of the United States respect and value the liberty and happiness of their fellow men in Europe. In the wars of the European powers, in matters relating to themselves, we have never taken any part. It is only when our rights are invaded that we resent injuries, or prepare for our defense. With the events in our half of the world, we are more immediately concerned.

We owe it, therefore, to the good relations existing between the United States and the European powers, to declare, that we should consider any attempt on their part to extend their system to any portion of this half of the world as dangerous to our peace and safety.

With the existing colonies or dependencies of any European power we have not interfered, and shall not interfere. But with the governments who have declared and maintained their independence, and whose independence we have acknowledged, we would view any oppressive interference by any European power as a clear sign of an unfriendly attitude towards the United States. . . .

Source: Excerpt from President James Monroe's Seventh Annual Message to Congress, December 2, 1823.

Some of the language and phrasing in this document has been modified from the original. The original document can be found on the HTM website, www.historicalthinkingmatters.org.

Sourcing

1. Who gave this speech and when? Aside from Congress, who is really supposed to hear this address?

Close Reading

2. What is Monroe's main message?

Contextualizing

3. There was a time when almost all of South and Central America was colonized by Spain. What does the phrase "governments who have declared their independence" suggest about developments in these colonies long before the Spanish-American War?



Document H: Miss Cuba Receives an Invitation

Miss Columbia (sitting) says to "her fair neighbor," Miss Cuba (standing): "Won't you join the stars and be my forty-sixth?" By December 1898, the U.S. had defeated the Spanish and the Treaty of Paris gave the U.S. control of Cuba, Puerto Rico, Guam, and the Philippines. In 1901, Cuba was under U.S. military rule, Cubans were drafting their constitution, and the role of the U.S. in Cuba was being debated in both countries.



Miss Cuba Receives an Invitation. MISS COLUMBIA (to her fair neighbor): "Won't you join the stars and be my forty-sixth?" (Chicago Record-Herald, 1901.)

Source: Chicago Record-Herald, 1901. Chicago, Illinois.

Sourcing

1. When was this published? How long after the start of the Spanish-American War?

Close Reading

2. Why might the cartoonist have chosen a ball and chain to represent Spain?
3. Why is Miss Columbia sitting down in front of a map of the U.S.? Why is Miss Cuba standing politely? What do these images say about the relationship between Cuba and the U.S.?



HISTORICALTHINKINGMATTERS.ORG

20-10-19-07 10:14

SPANISH-AMERICAN WAR

MAIN INQUIRY DOCUMENTS ANALYSIS CHART

Why did the United States invade Cuba?

Document	Date/Author	Causes suggested by this document	Evidence from this document supporting these causes
A <i>Journal</i>			
B <i>Times</i>			
C <i>Awake U.S.</i>			
D <i>Kinley</i>			

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HISTORICALTHINKINGMATTERS.ORG
Spanish-American War Main Inquiry Documents Analysis Chart, page 2

Document	Date/Author	Causes suggested by this document	Evidence from this document supporting these causes
E <i>Camps</i>			
F <i>More</i>			
G <i>Monroe</i>			
H <i>Miss Cuba</i>			
I <i>March</i>			

Appendix T

Bryan's Spanish American War Writing Assignment

Name _____ Date _____ Period _____

Historical Thinking Matters: Spanish-American War

Evidence-Based Essay

Statement:

“The explosion of the U.S.S. Maine
caused the United States to invade Cuba in 1898.”

Directions: Use the documents provided and your own knowledge of these documents, notes from the video clip, and notes from the textbook excerpt to evaluate this statement.

1. Do you agree with this explanation of the causes of the Spanish-American War? Why or why not?

2. Write a **thesis statement** explaining whether you agree or disagree and why or why not. For example, “The U.S. invaded Cuba to support the rebels and their fight for independence, an interest that existed long before the explosion of the Maine.”

3. Use and cite evidence from at least three (3) documents to support your analysis of this statement.

(1)

(2)

(3)

Evidence-Based Essay

"The explosion of the U.S.S. Maine caused the United States to invade Cuba in 1898."

-
- This image shows a single page of white paper with horizontal blue lines, typical of notebook paper. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

Appendix U

World War II: Decision to Drop the Atomic Bomb Documents and Assignment

2/23

Decisions to Drop the Bomb – Ending World War II

#1

"The development of nuclear power not only is an important addition to the technological and military power of the United States, but also creates grave political and economic problems for the future of this country... We believe ... the use of the atomic bombs for an early unannounced attack against Japan inadvisable. If the United States were to be the first to release this new means of destruction, we would sacrifice public support throughout the world, and risk the possibility of reaching international agreement in future control of such nuclear weapons."

From the Committee on Social and Political Implications, Report to the Secretary of War, June 1945

#2

"We, the undersigned scientists, have been working on the atomic bomb. We have feared attack by atomic bombs from our enemies. But today, with the defeat of Germany, this danger is behind us.

The war has to be brought speedily to a successful conclusion and attacks by atomic bombs may very well be an effective method of warfare. But we feel attacks on Japan could not be justified, unless Japan were given an opportunity to surrender and did not do so. If Japan still refused to surrender our nation might then, in certain circumstances, have to use an atomic bomb. But such a step should be seriously considered."

From a petition to President Truman from a group of concerned scientists.

#3

An excerpt from the Diary of President Harry S. Truman, 1945

In the midst of these discussions, a negative stand on my part might prevent an atomic attack on Japan. Thoughts of my ancestors being unhappy with my decision kept flashing through my mind. I knew all too well the destruction and human agony the bomb would cause.

I knew the danger they held in the hands of some tyrant. But I wanted the war to end. I wanted life to become normal again ... I hoped that by use of the bombs many fine young men might be released from the demands of war and be given a chance to live again.

Source: Truman by David McCullough, 1992, Simon and Schuster, New York, NY

#4

From the Diary of President Harry S. Truman, 1945, Excerpt, p. 444.

Almost as if trying to convince himself, Truman wrote how the bomb would be used on military targets only, which he knew to be only partly true. From his diary:

I have told the Secretary of War to use it against Japan so that soldiers and sailors are the target and not women and children ... The target will be a military one and we will issue a warning asking the Japanese to surrender one more time. They will not do that, but we will have given them a chance ... It seems to be the most terrible thing ever discovered.

Source: Truman by David McCullough, 1992, Simon and Schuster, New York, NY

#5

[Excerpt, below, from a statement later made by President Truman after the war]

The final decision of where and when to use the atomic bomb was up to me. Let there be no mistake about it. I regarded the bomb as a military weapon and never had any doubt that it should be used.

The top military advisers to the President recommended its use, and when I talked to [Winston] Churchill, he unhesitatingly told me that he favored the use of the atomic bomb if it might aid to end the war.

Source: Truman by David McCullough, 1992, Simon and Schuster, New York, NY

#6

"Why Did We Have to Win It Twice?" A Physicist Remembers His Work on the First Atomic Bomb
Adapted from Bernard Feld, 1980

In this 1980 interview, Bernard Feld recalled his work as a graduate student at Los Alamos. While he had little issues with the bomb's development use at Hiroshima, he had reservations about the second bomb at Nagasaki.

"To me, actually, the important event was not the first bomb, but the second. When they announced the second bomb, that came as a shock. I said, 'But the war is over.' In fact, the headlines at that time were the Japanese were surrendering. And then, bang, there was the bomb in Nagasaki. And that hit me like a glass of cold water thrown at me. I suddenly said, 'Now, wait a second. What for? Great! We ended the war. But why do you have to end the war twice?' That really started me thinking about what it was all about.

Source: Oral history courtesy of [Columbia Oral History Research Office, Columbia University](http://columbiaoralhistoryresearchoffice.columbia.edu/). Retrieved from [History Matters, George Mason University](http://historymatters.gmu.edu/d/141), at: <http://historymatters.gmu.edu/d/141>

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Name _____

Date _____

U.S. History – World War II: Decisions to Drop the Atomic Bomb

What are the two options that President Truman had available for ending the war with Japan?

Option 1:
Option 2:

Analyze the differing advice that President Truman received from his advisers and other key figures.

<i>Source</i>	<i>Evidence (quotes) that state their position:</i>	<i>Position on Atomic Bomb:</i>
#1 Committee on Social and Political Implications		
#2 Group of Concerned Scientists		
#3 Diary of President Truman (1945)		
#4 Diary of President Truman (1945)		

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Appendix V

Editing a Historical Text (from Historical Thinking Matters)

Parts of an Edited Historical Document

This handout will help you make sense of edits that have been made to the documents on the HistoricalThinkingMatters.org website.

2 READ: INTERVIEW ABOUT THE BOYCOTT

Head Note: Researchers from Fisk University visited Montgomery, Alabama, during the boycott to learn more and to document the movement. Here a woman shares her ideas about the boycott during an interview at a car pool dispatch center.

HEAD NOTE

The **head note** provides important contextual information about the document. It may tell you more about the author or the situation of its origin and can help you understand the document.

BRACKETS

Brackets [] either indicate that we have substituted a new word for a word in the original document or that we have inserted new words. We use **brackets** to make the document read more smoothly.

Maid: This stuff has been going on for a long time. To tell you the truth, it's been happening ever since I came here before [World War II]. But here in the last few years they've been getting worse and worse. When you get on the bus they yell: "Get on back there" and half of the time they wouldn't take your transfer, then they make you get up so white men could sit down where there were no seats in the back. And you know about a year ago they put one of the high school girls in jail 'cause she wouldn't move. They should have boycotted the buses then. But we are sure fixing 'em now and I hope we don't ever start back riding. We [are] people, we are not dogs or cats... All we want 'em to do is treat us right. They shouldn't make me get up for some white person when I paid the same fare and I got on first. And they should stop being so nasty. We say just like the white folks.

[The bus companies] are the ones losing the money and our preachers say we will not ride unless they give us what we want. You see the business men are losing money too, because people only go to town when they have to. When you do something to my people you do it to me too.

Source: Excerpt from an interview conducted by Willie Lee, January 1956, Montgomery, Alabama.

*This document is from the Rosa Parks inquiry.
HistoricalThinkingMatters.org*

SOURCE

The **source** gives specific information about the creation of the document. It can include the author, date, type of document, and where and how it was published. Paying attention to the **source** of a document helps you begin to imagine why the document was written and what it might say—even before you've read the actual document. **Source** is sometimes also called **attribution**.

ELLIPSES

(see pg. 1002)
Ellipses are three periods [. . .] that show where we have taken words out of the original document. We use **ellipses** instead of the original words when we want to shorten the document. Sometimes you will see **ellipses** with four periods at the beginning or end of a paragraph [. . .].

Appendix W

Bryan's Road to War Documents

1. "The Arsenal of Democracy," by Franklin D. Roosevelt.

Adapted Radio Address Delivered by President Roosevelt From Washington, December 29, 1940

We face a new threat to the security of our Nation ... The experience of the past two years has proven that no nation can appease the Nazis. No man can tame a tiger into a kitten by stroking it. There can be no appeasement with ruthlessness. A nation can have peace with the Nazis only at the price of total surrender.

There is risk in any course we take. The people of Europe do not ask us to do their fighting. They ask us for the implements of war: the planes, the tanks, the guns, the freighters, which will help them fight for liberty and security. We must get these weapons to them quickly, so that our children will be saved the suffering of war.

We must send every ounce and every ton of weapons and supplies that we can possibly spare – more ships, more guns, more planes ... more of everything. It is no more "un-neutral" for us to do that than for Sweden and Russia to send steel, ore, oil and other war materials into Germany every day.

We must be the great arsenal of democracy. For us this is an emergency as serious as war itself.

Adapted source: U.S., Department of State, Publication 1983, *Peace and War: United States Foreign Policy, 1931-1941* (Washington, D.C.: U.S., Government Printing Office, 1943), pp. 598-607

2. "Lend-Lease Speech," by President Franklin D. Roosevelt, on March 15, 1941

Nazi forces openly seek the destruction of all other governments on every continent, including our own ... The enemies of democracy were wrong in their calculations for a very simple reason. They were wrong because they believed that democracy could not [deal with] the terrible reality of a world at war.

This [Lend-Lease] decision is the end of any attempts at appeasement in our land. It is the end of urging us to get along with dictators. It is the end of compromise with tyranny and forces of oppression. The urgency is now.

When our production output is in full swing, the democracies of the world will prove that dictatorships cannot win.

We have to make sacrifices – every one of us. How long we must sacrifice will depend on how quickly we act now!

The British people and their allies need ships. From America, they will get ships.

They need planes. From America, they will get planes.

They need food. From America, they will get food.

And so our country is going to be the arsenal of democracy. Our country is going to play its part to win this war.

Adapted source: "Lend-Lease Speech." (1941). President Franklin Delano Roosevelt. University of San Diego. Retrieved at: <http://history.sandiego.edu/GEN/text/us/fdr1941b.html>

3. "Germany Invades Russia," Adapted from *No Ordinary Time*, by Doris Kearns Goodwin.

"At dawn of June 22, 1941, in a stunning move that would prove to be a great turning point of the war, Germany invaded Russia. "Now the guns will be thundering," Germany's Propaganda Minister, Joseph Goebbels, recorded in his diary. "May God bless our weapons."

The idea of invading Russia had been a part of Hitler's dream for decades. "When we speak of new territory in Europe today, we must think of Russia and her border states," he had written in *Mein Kampf* in 1925.

"This colossal empire [Russia] in the East is ripe for dissolution. The end of Jewish domination will also be the end of Russia as a state."

The Nazi-Soviet pact of 1939 had held off Hitler's plans. Since the beginning of the war, he insisted he could oppose Russia only when he was free in the West. A two-front war was the nightmare of German generals for a century. But late in 1940, while the war with England was still going on, Hitler invaded Russia.

"We have only to kick in the door," Hitler told General Alfred Jodl, "and the whole rotten structure will come crashing down."

On the eve of the attack, Hitler dispatched a letter to Mussolini. "Since I struggled through this decision, I again feel spiritually free," he claimed. "The partnership with the Soviet Union was a break with my whole being and my obligations. I am happy now to be delivered from that torment."

Adapted source: Goodwin, Doris Kearns. (1994). *No Ordinary Time: Franklin & Eleanor Roosevelt – The Home Front in World War II*. New York, NY. Simon & Schuster.

4. "Exhausting All Resources," by Franklin D. Roosevelt, October 1941

Roosevelt understood that lend-lease would fail unless the United States could keep the sea open. But he decided to ask Congress to remove Neutrality Act restrictions that prevented merchant ships from being armed.

He wanted to ask Congress in July, but he feared his request would kill his shot at extending the draft. So he backed off.

But opinion was changing. In April, only 30 percent of the American people thought that American ships should be armed with weapons to defend themselves if attacked. By September, 46 percent of Americans agreed. Now, with Germans sinking more ships, an overwhelming majority of 72 percent favored arming merchant ships.

It took 11 days of debate in Congress before the Senate finally agreed, on November 8, to amend the Neutrality Act and arm merchant ships with weapons. But it only passed by 13 votes.

Roosevelt knew that he was nearing the end of the few resources he had to help the Allied forces in Europe. Except for some dramatic event, there was no chance that Congress would declare war on Germany.

He had no more tricks left. The bag from which he pulled so many rabbits was empty. His only option was to wait.

Adapted source: Goodwin, Doris Kearns. (1994). *No Ordinary Time: Franklin & Eleanor Roosevelt – The Home Front in World War II*. New York, NY. Simon & Schuster.

5. Franklin D. Roosevelt's Infamy Speech, December 8, 1941

Yesterday, December 7, 1941 - a date which will live in infamy - the United States of America was suddenly and deliberately attacked by naval and air forces of the Empire of Japan at Pearl Harbor in Oahu, Hawaii.

The United States was at peace with Japan and was in conversation with its Government toward maintaining peace in the Pacific.

The attack yesterday on the Hawaiian Islands caused severe damage to American naval and military forces. Many American lives have been lost. American ships have also been reported torpedoed on the high seas between San Francisco and Honolulu.

Japan has launched a surprise offensive throughout the Pacific area ... with attacks on Malaya, Hong Kong, Guam, the Philippine Islands, Wake Island and Midway Island. The facts speak for themselves. The people of the United States understand the attack the Japanese have made on the life and safety of our nation.

As Commander-in-Chief of the Army and Navy, I have directed that all measures be taken for our defense. No matter how long it may take us to overcome this invasion, the American people will win absolute victory.

We will not only defend ourselves, but we will make very certain that this form of treachery shall never endanger us again. With confidence in our armed forces - with the unbounded determination of our people - we will gain the inevitable triumph - so help us God.

Adapted source: "Day of Infamy Speech." (1941). President Franklin Delano Roosevelt. University of Missouri - Kansas City. Retrieved at: <http://www.umkc.edu/lib/spec-col/ww2/PearlHarbor/fdr-speech.htm>

Appendix X

Example of Bryan Using Primary Source Documents to Cover Content for County Exam

The Truman Doctrine

Adapted speech by President Harry S. Truman, March 12, 1947

Retrieved from The Truman Library, http://www.trumanlibrary.org/whistlestop/study_collections/doctrine/large/documents/pdfs/5-9.pdf#zoom=100

The United States has received from the Greek Government an urgent appeal for financial and economic assistance ... I do not believe that the American people wish to turn a deaf ear to them. They are not a rich country and lack sufficient resources. Since 1940, the country has suffered invasion, years of occupation by the Axis powers, and bitter internal struggles.

There is no other country to which Greece can now turn. No other nation is willing or able to provide the support their government needs. The United Nations is not yet in a position to assist in this crisis.

Greece's neighbor, Turkey, also needs our help. Since the war, Turkey has asked for assistance from Great Britain and the U.S. to modernize their country and preserve order in the Middle East.

But Great Britain has informed us that they cannot help Turkey because of their own financial difficulties after the war. We are the only country able to provide that help.

Every nation must choose between alternative ways of life. The choice is too often not a free one ... I believe that we must assist free peoples to work out their own destinies in their own way ... We must keep that hope alive ... They look to us for support in maintaining their freedoms.

If we falter in our leadership, we may endanger the peace of the world – and the welfare of our nation.

The Marshall Plan

Adapted speech by George C. Marshall, June 5, 1947, at Harvard University

Retrieved from: http://www.trumanlibrary.org/whistlestop/study_collections/marshall/large/documents/pdfs/8-7.pdf#zoom=100

General George C. Marshall was the lead military advisor to President Roosevelt and President Truman. The plan to aid war-torn nations with large financial resources was called the "Marshall Plan" by the media.

"The people of this country are so distant from the troubled areas of the Earth and it is hard for them to comprehend the suffering and devastation from the war. In many countries, confidence in the local currencies has been shaken ... the rehabilitation of the economies of Europe will take a much longer time than we expected.

Raw materials and fuel are in short supply. Machinery is lacking or worn out.

The United States must do whatever it is able to do to assist in the return of the normal economies of the world. Our policy is not directed against any country, but against hunger, poverty, desperation and chaos ...

... Europe's needs for the next three or four years include food and other essential products ...

It is logical that the United States should do whatever it is able to do to assist in the return of normal economic health in the world. Our purpose should be the revival of a working economy in the world to allow free political and social conditions across Europe.

With foresight and a willingness of our people to face up to this responsibility, the difficulties I have outlined here can and will be overcome.

Yalta Conference

It is February 1945 and while the war continues its end is in sight. The Allied leaders: Churchill, Roosevelt, and Stalin met to discuss the end of war and plan for peace. During the meeting, the leaders worked out the division of Germany into US, British, French, and Soviet occupation zones.

Roosevelt asked Stalin to declare war on Japan because the US might need Soviet help to invade Japan. Poland was a difficult issue because the Soviet Union has occupied this country. The USSR (Soviet Union) wants to keep Poland under its control to protect the Soviet western boundary from future invasions. The meeting stalled until Stalin agreed to allow Poles to choose their own government in elections.

Roosevelt is hopeful that free elections in countries such as Poland will create democratic allies. At the end of the meeting it is clear that disputes over free elections in Eastern Europe will continue. Since the beginning of the war, Stalin has been portrayed as the friendly "Uncle Joe" in the American press, but that image may now change.

Founding of the United Nations

It is April of 1945. Eleanor Roosevelt, first lady of the U.S. and wife of President Franklin D. Roosevelt, has been a long time champion of world peace and is now the US delegate to a meeting with other nations to establish a world peace organization.

The delegates of fifty nations have gathered in San Francisco to form this new international peace keeping organization and to write a constitution for nations to settle their differences peacefully. This organization will be called the United Nations (UN), and their goal is to try to stop wars from starting and to end those that break out. The UN will be mainly controlled by a Security Council with five permanent members: the United States, Great Britain, France, China and the Soviet Union.

Each of the members will have veto power to block unwanted actions. Many are nervous that the permanent members will be unable to agree on many topics due to their expanding differences. The US participation in this organization marks a significant change from the days when the US refused to join the League of Nations after World War I. In fact, Mrs. Roosevelt has pledged to fight for human rights all over the world.

Millions of people left homeless by the war continue to face horrible poverty. Many delegates see this new organization as a new light in the world to fight against war, poverty, and, hunger.

Potsdam Conference

It is July 1945 and Germany has surrendered. President Harry S Truman is meeting with Churchill and Stalin in Potsdam to discuss, once again, how to end World War II. The new president is nervous about his first meeting with fellow world leaders. The allies continue to debate the issues from the meeting at Yalta, including the future of Germany and Poland.

Three key issues are decided at the Potsdam Conference. First, the Allies will demand an unconditional surrender from Japan. Second, Nazi leaders in Germany will be put on trial for war crimes. Third, Germany will be divided and occupied by the Allies. The thorny issue of the Soviet occupation of Poland was discussed and President Truman insisted on promised elections

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Nuremberg Trials

It is March 1946, almost a year since World War II ended in Europe. US Supreme Court Justice Robert Jackson is going to Nuremberg, Germany to help lead trials of the defeated Nazis.

Americans have been appalled by the stories of Nazi brutality that have been in the press. The horror of the death camps and extermination of millions of Jews was a shock beyond belief. Many are glad to see such a formal judgment of those responsible for these horrible war crimes.

The trials are being held in Nuremberg, Germany, the former site of many Nazi rallies. These Nazi leaders have been accused of crimes against humanity, such as mass murder, forced slavery, and aggressive warfare. Twenty-one major leaders are being tried along with over one hundred fifty others. These criminals are tried by a judicial panel with one judge from the United States, Great Britain, Soviet Union, and France. The trials will last about ten months.

It is believed that most of those accused will be sentenced to death by hanging or sent to prison. A few may be acquitted (found innocent) as evidence is required for conviction. The horrors of Nazi brutality are being shown to the world and to the German public in hopes of revealing the true nature of Hitler's regime. The total horror of the Nazi crimes has moved the U.S to another new role: world judge.

Founding of NATO

It is May 1949, four years after the Germans surrendered. General Dwight D. Eisenhower retired from the military after the war. Many thought he would run for president in 1948, but he did not. President Truman convinced "Ike" (Eisenhower's nickname) to become the supreme commander of the Multinational military forces of a new alliance.

The democracies: the United States, Britain, and France are ending their official occupation of Germany and have helped create a democratic West Germany. The Soviets are maintaining their presence in East Germany. To keep the Soviets from taking over territory that the democracies are now leaving, Canada has proposed creating a military alliance between ten democratic nations in Europe and America.

These nations are sworn to protect each other from outside aggression and agree that "an armed attack against one or more of them ...shall be considered an attack against them all." The United States has decided to join this alliance, called the North Atlantic Treaty Organization (NATO). This is the first time in history that the US has joined a peacetime alliance. Furthermore, the US is backing up this alliance by placing the wartime general, Dwight Eisenhower, in charge and permanently stationing a large number of troops in Europe.

The US Congress has authorized over a billion dollars to support members of the alliance. The Soviet Union views this new alliance as a threat to its security and power. The Soviets plan a similar alliance among its eastern European territories to counter the presence of NATO.

Interestingly, the Soviet Union detonated its first atomic bomb later that same year. Four years after the defeat of Germany, Europe is now divided into two heavily armed forces facing each other.

for Poland. However, Stalin was less clear in his support of the planned elections and remained silent on the topic when pressed.

During the conference, Truman received word that an atomic bomb had been successfully tested in New Mexico and shared this secret information with Churchill and Stalin. Stalin knew about the bomb from Soviet spies and he feared America's leading atomic power. Japan, however, was still unaware of U.S. development of the bomb.

Occupation of Germany

It is August of 1945. Germany surrendered on May 8. General Eisenhower is Supreme Allied Commander in Europe. More than half of Germany had been liberated from the Nazis by the Soviets, the rest by allied forces which included the United States.

Germany has been devastated by allied bombing and the invasion that took place during the war. Now, Germany has been divided in half. The Soviet Union is in control of East Germany and has already dismantled and moved industrial resources to Russia in an attempt to help its own recovery. The Soviets have made it clear to citizens in its occupied territory that they will not keep their promise of allowing a democratically elected government.

West Germany is subdivided into three zones controlled by Great Britain, France, and the United States. These three have agreed to share control of West Germany and are finding money to help their territories rebuild. They hope the region will be able to recover economically and a stable, democratic government will be created. However, tensions with the Soviets over the status of East Germany continue to grow. Many foresee a conflict over this region between the allies. As a safeguard, the United States has kept a large number of soldiers, tanks, and other weapons in Europe well after Germany surrendered just in case they are needed.

Occupation of Japan

It is October 2, 1945, almost two months after the first atomic bomb was dropped on Hiroshima. President Truman has appointed General Douglas MacArthur as Supreme Commander of Allied Powers and has given him total military and civilian authority over Japan to help them rebuild.

MacArthur has written a constitution for Japan based on the U.S. Constitution. A democratic, representative government is being established – giving women the right to vote and abolishing religious discrimination, the secret police, and secret societies that helped bring on the war.

The new government also plans comprehensive land reform. This means that more Japanese families will have land. MacArthur's programs will help rebuild the Japanese economy by finding markets for their products. He has also helped establish public health programs. Japan is no longer a military threat to the US or Asia. What was left of the army after World War II has been reformed to serve as a national police force and the extreme military has been outlawed.

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World War II Outcomes

Name _____
Date _____

Directions: Read the assigned articles to determine the main idea of the article and what impact these events had on "the common good" during this time.

Article	Main Idea?	What impact does this have on "the common good?"	How might this change the role of the United States in the world?
Truman Doctrine			
Marshall Plan			
Yalta Conference			
Founding of the United Nations			

<i>Article</i>	<i>Main Idea?</i>	<i>What impact does this have on "the common good?"</i>	<i>How might this change the role of the United States in the world?</i>
Potsdam Conference			
Occupation of Germany			
Occupation of Japan			
Nuremberg Trials			
Founding of NATO			

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Appendix Y

Overview of Maya's Imperialism Unit: Topics, Resources, and Activities

	Lesson Topic(s)	Resources	Activities
Day 1	Imperialism and annexation of the Philippines	Textbook Political cartoon* Beveridge campaign speech*	1) Students use textbook to define imperialism 2) Students take notes on imperialism 3) Class analyzes political cartoon 4) Students read Beveridge speech in pairs. 5) Independently, students answer question of whether or not the U.S. should keep the Philippines.
Day 2	US Imperialism in Hawaii, Japan, and China	Textbook Excerpt from primary source document in textbook	1) Students use textbook to answer the question, "Who was Queen Liliuokalani?" 2) Notes on U.S. interests in Hawaii 3) Students read textbook section on Hawaii, Japan or China and complete chart. Class reviews. 4) Students read excerpt from document in textbook and answer two questions in pairs.
Day 3	US Imperialism and annexation of Hawaii	Pacific region map worksheet* Primary source document excerpts in textbook	1) Students answer, "What happened with the U.S. and Hawaii?" 2) Students complete map worksheet 3) Students read 2 excerpts from primary documents in textbook about U.S. imperialism in Hawaii and answer questions.

Day 4	Spanish American War- Invasion of Cuba	Textbook 3 primary source documents Document chart Video clip on yellow journalism	<p>1) Students use textbook to answer the question, “What are the basic facts on the Spanish American War?”</p> <p>2) Class reads Hearst journal excerpt and completes chart</p> <p>3) Class watches clip about yellow journalism</p> <p>4) Students read “Awake” document in pairs and answer questions. Class completes chart.</p> <p>5) Students read “March of the Flag” document in pairs and answer questions.</p>
Day 5	Spanish American War- Invasion of Cuba	Textbook 2 primary source documents Document chart	<p>1) Students answer the following question: “The explosion of which U.S. Naval ship persuaded Americans that Spain did it?”</p> <p>2) Class reviews “Awake” song</p> <p>3) Students read “March of the Flag” independently and answer questions in pairs. Class reviews chart.</p> <p>4) Students read “Reconcentration camps” document in pairs, answer 1 question, and complete document chart.</p>

Day 6	Spanish American War and its aftermath	Political cartoon in textbook Primary source documents from previous lessons Document chart Handout on thesis writing and outlining	1) Students answer question, "What is one reason the US may have invaded Cuba?" 2) Students predict what happened in post-war Cuba. 3) Class analyzes political cartoon in textbook. 4) Students take notes on Cuba and the Panama Canal. 5) Mini lesson on thesis writing and outlining 6) Students begin to identify examples and evidence for outline.
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* Resources marked with an asterisk indicate supplementary resource from textbook.

Appendix Z

Overview of Maya's World War II Unit: Topics, Resources, and Activities

	Lesson Topic(s)	Resources	Activities
Day 1	Inflation Totalitarian leaders U.S. isolationism	Textbook Video clip about WWII Worksheet*	1) Students use textbook to answer the question, "What is isolationism?" 2) Video clip 3) Students complete worksheet using info from video and textbook; class reviews. 4) Students analyze political cartoon from textbook in pairs.
Day 2	Appeasement Blitzkrieg WWII geography U.S. isolationism v. involvement	Textbook Map of Europe	1) Students use textbook to answer the question, "What is appeasement?" 2) Students read quotes from Chamberlain and Churchill in textbook and answer questions. 3) Class reviews blitzkrieg and students answer questions in textbook. 4) Students label map of Europe using textbook. 5) Students answer questions about political cartoon in textbook.
Day 3	WWII vocabulary Road to war Pearl Harbor U.S. home front	Textbook Excerpt from FDR speech* Video clip	1) Students use textbook to answer the question, "What was Roosevelt's Quarantine Speech?" 2) Students define and draw a symbol for 3 vocabulary terms. 3) Video clip- <i>Road to</i>

			<p><i>War</i></p> <p>4) Class reads excerpt from <i>Day of Infamy</i> speech; students answer questions in pairs.</p> <p>5) Students answer questions about war poster in textbook.</p>
Day 4	<p>Manhattan project</p> <p>Pearl Harbor</p> <p>WWII propaganda</p> <p>Japanese internment</p> <p>African Americans and WWII</p> <p>WWII vocabulary</p>	<p>Textbook</p> <p>Vocabulary handout</p> <p>Primary source document</p>	<p>1) Students use textbook to answer the question, “What is the Manhattan project?”</p> <p>2) Class reviews Pearl Harbor</p> <p>3) Students view propaganda poster and answer two questions in textbook.</p> <p>4) Students complete vocabulary worksheet.</p> <p>5) Students read primary source about African Americans during WWII and answer questions in pairs.</p> <p>6) Teacher gives students list of vocabulary terms for quiz.</p>
Day 5	<p>Holocaust</p> <p>Mexican Americans, African Americans, and Native Americans during WWII</p>	<p>Textbook</p> <p>4 primary source documents</p>	<p>1) Students use textbook to answer the question, “What is the holocaust?”</p> <p>2) Students complete a quiz, which consists of multiple choice, true/false, and 1 short answer question</p> <p>3) Teacher discusses concentration camps with class.</p> <p>4) Class reads a document about a Mexican-American</p>

			<p>during WWII.</p> <p>5) Students read 2 more documents in pairs and answer questions.</p> <p>6) Teacher reads a 4th document to the class.</p>
Day 6	Life on home front	<p>Textbook</p> <p>WWII songs about the draft</p> <p>Propaganda poster</p> <p>Primary source document from day 5</p>	<p>1) Students use textbook to answer the question, “What is rationing?”</p> <p>2) Class reviews life on home front for minority groups.</p> <p>3) Students listen to and discuss 2 songs about the draft.</p> <p>4) Students analyze a propaganda poster in pairs.</p> <p>5) Students answer questions about primary source document in pairs.</p> <p>6) Students write brief constructed response (BCR) about life on the home front.</p>
Day 7	End of WWII and its aftermath	<p>Textbook</p> <p>Excerpt from Yalta conference</p>	<p>1) Students use textbook to answer the question, “What is the Yalta conference?”</p> <p>2) Students take notes on various post war topics</p> <p>3) Students read document excerpt in pairs and answer questions.</p>

Appendix AA

World War II Quiz (Formative Assessment)

Name: _____ Class: _____ Date: _____ ID: A

World War II Quiz #1

Multiple Choice

Identify the letter of the choice that best completes the statement or answers the question.

- _____ 1. Adolf Hitler established a single party that suppressed opposition, making Germany a
 - a. totalitarian state.
 - b. Communist country.
 - c. capitalist country.
 - d. fascist state.
- _____ 2. Manchuria, China was invaded by
 - a. Italy.
 - b. China.
 - c. Germany.
 - d. Japan.
- _____ 3. What agreement freed Hitler to use force against Poland without fear of Soviet intervention?
 - a. the Munich Conference
 - b. Soviet-German Non-Aggression Pact
 - c. Versailles Treaty
 - d. Neutrality Act
- _____ 4. France and Great Britain declared war on Germany after the invasion of
 - a. Ethiopia.
 - b. Poland.
 - c. the Soviet Union.
 - d. the United States.
- _____ 5. American neutrality ended after the attack on
 - a. the United States.
 - b. Great Britain.
 - c. France.
 - d. Mexico.

Matching

Match each item with the correct statement below.

- a. anti-Semitism
 - b. Nazi Party
 - c. Joseph Stalin
 - d. Adolf Hitler
 - e. Benito Mussolini
- _____ 6. German dictator
 - _____ 7. led Italian Fascist Party
 - _____ 8. led by Adolf Hitler
 - _____ 9. hatred of Jews
 - _____ 10. Communist leader
- Match each item with the correct statement below.
- a. America's policy at the beginning of WWI
 - b. disarmament
 - c. Winston Churchill
 - d. attack on Pearl Harbor
 - e. blitzkrieg
- _____ 11. lightning war
 - _____ 12. Great Britain's prime minister (similar to a president)
 - _____ 13. isolationism
 - _____ 14. giving up military weapons
 - _____ 15. December 7, 1941

Name: _____

ID: A

True/False

Indicate whether the sentence or statement is true or false.

- ____ 16. The Attack on Pearl Harbor was secretly planned by the Japanese.
- ____ 17. Americans joined the war and the allies after Germany invaded Poland.
- ____ 18. The Axis powers include the U.S., Germany, and Italy.
- ____ 19. The Allied powers included the U.S., Great Britain, and France.
- ____ 20. American foreign policy remained neutral/isolationist even after the attack on Pearl Harbor.

Appendix BB

Imperialism Summative Assessment

Name: _____ Class: _____ Date: _____

ID: A

Imperialism

True/False

Indicate whether the sentence or statement is true or false.

- _____ 1. In the late 1800s and early 1900s, Americans faced competition from other nations overseas.
- _____ 2. Many Americans came to believe that to ensure economic growth, the United States needed to expand its power overseas.
- _____ 3. In 1893, the Hawaiian queen was overthrown by native Hawaiian rebels.
- _____ 4. In 1898, the United States made Hawaii a state.
- _____ 5. The people of Cuba had lived under Mexican rule for centuries.
- _____ 6. When the *Maine* exploded (At the beginning of the Spanish American War), American newspapers such as the New York Journal made it seem like the Spain sunk it on purpose.

Multiple Choice

Identify the letter of the choice that best completes the statement or answers the question.

- _____ 7. Noninvolvement in world affairs is called
 - a. expansionism.
 - b. isolationism.
 - c. imperialism.
 - d. annexation.
- _____ 8. Whose belief in expansionism led to the building of the Panama Canal?
 - a. William H. Seward
 - b. Francisco Madero
 - c. William Gorgas
 - d. Theodore Roosevelt
- _____ 9. For centuries, the people of Cuba lived under the rule of
 - a. Mexico.
 - b. Spain.
 - c. Russia.
 - d. Britain.
- _____ 10. Which incident led to Congress's declaring war on Spain?
 - a. explosion of the *Maine*
 - b. arrest of José Martí
 - c. Spanish ships in Santiago
 - d. capture of San Juan Hill
- _____ 11. Which leader wanted Hawaiians to regain economic control of their islands?
 - a. Queen Liliuokalani
 - b. King Kamehameha I
 - c. William H. Seward
 - d. Grover Cleveland
- _____ 12. President Theodore Roosevelt helped end the Russo-Japanese War with the
 - a. Gentlemen's Agreement.
 - b. spheres of influence.
 - c. Great White Fleet.
 - d. Treaty of Portsmouth.
- _____ 13. Events in what country triggered the Spanish-American War?
 - a. Mexico
 - b. Cuba
 - c. Puerto Rico
 - d. Guam
- _____ 14. Panamanians successfully revolted against Colombia with help from
 - a. France.
 - b. Mexico.
 - c. Spain.
 - d. the United States.

“The Philippines are ours forever. . . . And just beyond the Philippines are China’s illimitable markets. We will not retreat from either. . . . The Pacific is our ocean.”
 –Senator Albert Beveridge, 1900

- D**
B
C
15. This excerpt above expresses an opinion that supports an American foreign policy of _____.
- a. isolationism c. imperialism
b. expansionism d. pacifism

"... The infantry got nearer and nearer the crest of the hill. . . . Then I stopped my men for fear they should injure their comrades, and called to them to charge the next line of trenches. . . . Thinking that the men would all come, I jumped over the wire fence in front of us and started at the double; but, as a matter of fact, the troopers were so excited, what with shooting and being shot, and shouting and cheering, that they did not hear, or did not heed me; and after running about a hundred yards I found I had only five men along with me. Bullets were ripping the grass all around us. . . ."

—Theodore Roosevelt, *The Rough Riders*, 1899

16. This passage above about fighting in Cuba during the Spanish-American War indicates _____
- a. the confusion of battle
b. the fear of soldiers
c. the bravery of the Spaniards
d. the power of machine guns

President Theodore Roosevelt, determined to build the Panama Canal, backed a revolution in Panama. He said "I took the canal zone and let Congress debate," and later remarked, "and while the debate goes on, the canal does also."

17. As expressed in this passage above, Roosevelt's attitude and actions in securing land for the Panama Canal _____ many Latin Americans, some members of Congress, as well as many ordinary Americans.
- a. amused
b. angered
c. pleased
d. disappointed

“[Panama was mostly] a damp, tropical jungle, intensely hot, swarming with mosquitoes. . . .”

18. The mosquitoes mentioned in this excerpt above from an English writer's description carried the deadly diseases of _____.
- | | |
|-------------------------------|-----------------------------|
| a. smallpox and scarlet fever | c. rickets and diphtheria |
| b. influenza and malaria | d. yellow fever and malaria |

Name: _____

ID: A

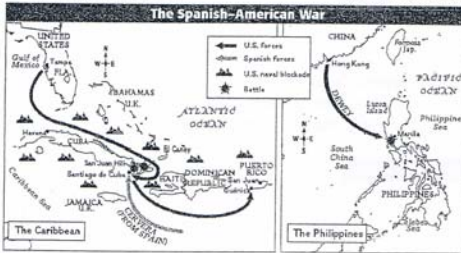


19.



According to the map above, most United States overseas possessions in 1900 were _____.

- a. in Hawaii
- b. in the United States
- c. in the Atlantic Ocean
- d. In the Pacific Ocean

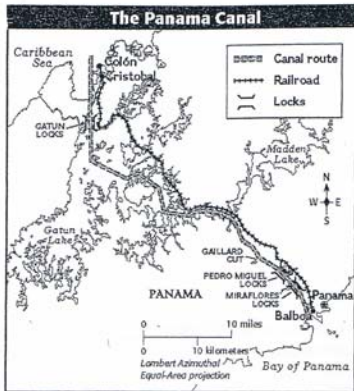


20.

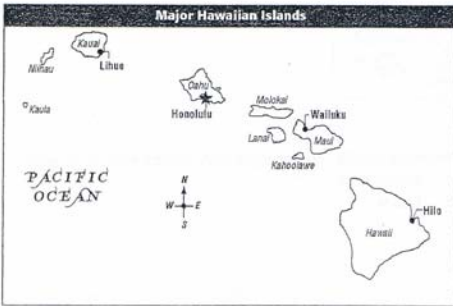



Based on the maps above, on which of the following islands was the Spanish-American war *not* fought?

- a. Cuba
- b. Crete
- c. Puerto Rico
- d. Luzon



21. Which two bodies of water did the length of the Panama Canal connect?
- a. Bay of Panama & Madden Lake c. Caribbean Sea & Gatun Lake
b. Bay of Panama & Gatun Lake d. Caribbean Sea & Bay of Panama



22.  Based on the map, on which Hawaiian island is the state capital located? National and state capitals are usually indicated on maps with stars.
- a. Hawaii
b. Maui
c. Honolulu
d. Oahu

Name: _____

ID: A

- ____ 23. What natural resource did the U.S. trade and grow in Hawaii?
a. grapes c. salt
b. sugar d. wheat
- ____ 24. Before the Age of Imperialism the United States, practiced the policy of
a. isolationsism c. imperialism
b. expansionism d. foreign
- ____ 25. Christian _____ from the U.S. began arriving in Hawaii in the early 1800s and established schools and businesses.
a. workers c. missionaries
b. children d. families
- ____ 26. Hawaii was _____ to the U.S.
a. given c. forbidden
b. taken d. annexed
- ____ 27. Senator Albert Beveridge, noted during the Spanish American War, "If England can govern foreign lands, so can America," what does this quote represent?
a. alliances c. imperialism
b. tokenism d. isolationsim
- ____ 28. At the end of the Spanish American War
a. Cuba was still under Spain's control c. Cuba was partially free, it became a U.S. protectorate
b. Cuba became a U.S. state d. Cuba joined forces with Argentina
- ____ 29. A U.S. government worker when evaluating Cuba in the Spanish American war noted all of the horrible conditions of Cubans in "Reconcentration Camps" in a telegram in order to.....?
a. to show the horrible conditions Spain imposed on Cuba c. to make Cuba look like a dirty place
b. to expand its territory d. to make the U.S. look good
- ____ 30. The foreign policy that promoted the U.S. linking its business interests abroad was called
a. Monroe Doctrine c. Taft Corollary
b. Roosevelt Corollary d. dollar diplomacy

Essay: Pick two out of three BCRs.

31. **Spanish American War:** Why did the US invade Cuba? Choose at least two reasons why the United States invaded Cuba. Please defend your argument by using quotes from the documents we read in class. (1-2 paragraphs)
32. **Imperialism:** What is imperialism and what are some of its major causes? Use examples we have discussed in class to support your ideas.
33. **Annexation:** Hawaii eventually became annexed (added) to the U.S., what interests did the U.S. have in Hawaii?

Appendix CC

Senator Beveridge Excerpt- Maya's Class

T10-0651a-US.11-17-08

Name _____ Date _____ Class _____

★ Primary Source Reading 22



Albert J. Beveridge, Empire Builder

Interpreting the Source Senator Albert J. Beveridge of Indiana wanted the United States to keep the Philippines. He believed that the United States should establish an empire and ultimately come to dominate the world. As you read part of his September 1898 campaign speech, think about how he justified his position.

Hawaii is ours, Puerto Rico is to be ours; at the prayer of the people, Cuba will finally be ours; in the islands of the East, even to the gates of Asia, coaling stations are to be ours; at the very least the flag of a liberal government is to float over the Philippines, and I pray God it may be the banner that Taylor unfurled in Texas and Frémont carried to the coast—the stars and stripes of glory.



CHAPTER 22

And the burning question of this campaign is whether the American people will accept the gifts of events; whether they will rise as lifts their soaring destiny; whether they will proceed upon the lines of national development surveyed by the statesmen of our past; or whether, for the first time, the American people doubt their mission, question fate, prove apostate [give up faith] to the spirit of their race, and halt the ceaseless march of free institutions.

The opposition tells us that we ought not to govern a people without their consent. I answer: The rule of liberty, that all just government derives its authority from the consent of the governed, applies only to those who are capable of self-government. . . .

Will you say by your vote that American ability to govern has decayed . . . ? Will you affirm by your vote that you are an infidel [an unfaithful one] to American vigor and power and practical sense; or that we are of the ruling race of the world, that ours is the blood of government, ours the heart of dominion . . . ? Will you remember that we do but what our fathers did—we but pitch the tents of liberty farther westward, farther southward—we only continue the march of the flag. . . .

Source: *Modern Eloquence*, Thomas B. Reed, editor. Vol. XI. Philadelphia, 1903, pages 224–225. Reprinted in *The Annals of America*, Vol. 3. Chicago: Encyclopaedia Britannica, 1968.

DOCUMENT-BASED QUESTION

DIRECTIONS: Answer the following question on a separate sheet of paper.
How does the author use American history to support his position?



DIRECTIONS: Writing an Editorial You have just heard Senator Beveridge's speech. Give your opinion of it in a letter to the editor of a newspaper. Support your opinion with reasons and try to convince your readers that they should support your ideas.

57

Appendix DD

Maya's World War II Unit: Churchill and Chamberlain Quotes from Textbook

"We should seek by all means in our power to avoid war, by analyzing possible causes, by trying to remove them, by discussion in a spirit of collaboration and good will. I cannot believe that such a programme would be rejected by the people of this country, even if it does mean the establishment of personal contact with dictators." -Chamberlain, 1938

"The Prime Minister desires to see cordial relations between this country and Germany... You must have diplomatic and correct relations, but there can never be friendship between the British democracy and the Nazi power." -Churchill

Question students answered: How does Chamberlain's comment hint at why Churchill's warnings went unheeded in 1938?

Appendix EE

Maya's Lesson on U.S. Imperialism in Hawaii: Primary Source Document and Questions from the Textbook

Princess Ka'iulani, niece of Hawaii's Queen Liliuokalani, visited Washington DC in 1893 to plead for a restoration of the monarchy.

"Seventy years ago, Christian Americans sent over Christian men and women to give religion and civilization to Hawaii. Today, 3 of the sons of the missionaries are at your capitol, asking you to undo their father's work. Who sent them? Who gave them the authority to break the constitution which they swore they would uphold? Today, I, a poor, weak girl, with not one of my people near me and all these statements against me, have the strength to stand up for the rights of my people. Even now I can hear their wail in my heart., and I am strong...strong in the faith of God, strong in the knowledge that I am right, strong in the struggle of seventy million people who in this free land will hear my cry and will refuse to let their flag cover dishonor to mine!"

1a. Recall. Refer to document 1. Why does Ka'iulani feel that she will be successful?

1b. Contrast. In Ka'iulani's view, how are the sons of the early missionaries different from their fathers?

Maya's Infamy Document

Name _____ Date _____ Class _____

★ Primary Source Reading 26

**A Date Which Will Live in Infamy**

Interpreting the Source On December 8, 1941, President Franklin D. Roosevelt appeared before Congress to ask for a declaration of war against Japan. His address was broadcast to Americans over the radio. As you read this excerpt of his brief speech, imagine how Americans listening to the radio reacted to his words.

Mr. Vice President, Mr. Speaker, members of the Senate and the House of Representatives: Yesterday, December 7, 1941—a date which will live in infamy—the United States of America was suddenly and deliberately attacked by naval and air forces of the Empire of Japan. . . .

It will be recorded that the distance of Hawaii from Japan makes it obvious that the attack was deliberately planned many days or even weeks ago. During the intervening time the Japanese Government sought to deceive the United States by false statements and expressions of hope for continued peace.

The attack yesterday on the Hawaiian Islands has caused severe damage to American naval and military forces. I regret to tell you that very many American lives have been lost. . . .

As Commander in Chief of the Army and Navy I have directed that all measures be taken for our defense.

Always will we remember the character of the onslaught against us. . . .

I believe that I interpret the will of the Congress and of the people when I assert that we will not only defend ourselves to the uttermost but will make it very certain that this form of treachery shall never again endanger us.

Hostilities exist. There is no blinking at the fact that our people, our territory, and our interest are in grave danger.

With confidence in our armed forces, with the unbounding determination of our people, we will gain the inevitable triumph. So help us God.

I ask that the Congress declare that since the unprovoked and dastardly attack by Japan on Sunday, December 7, 1941, a state of war has existed between the United States and the Japanese Empire.

SOURCE: *The Public Papers and Addresses of Franklin D. Roosevelt*, 1941.

DOCUMENT-BASED QUESTION

DIRECTIONS: Answer the following question on a separate sheet of paper.

What was President Roosevelt implying when he said that "this form of treachery shall never again endanger us"?



DIRECTIONS: Writing a Diary Entry You are an American teenager learning of this declaration of war. Write an entry in your diary dated December 8, 1941.



CHAPTER 26

Appendix GG

Spanish American War Inquiry: Analysis Chart and Documents

710 11/25/28



SPANISH-AMERICAN WAR MAIN INQUIRY DOCUMENTS ANALYSIS CHART *Why did the United States invade Cuba?*

Document	Date/Author	Causes suggested by this document	Evidence from this document supporting these causes
A <i>Journal</i>			
B Below <i>March of the Flag</i>			
C Monument <i>concentration camps</i>			
D and <i>Awake United States</i>			

Awake United States!

Head Note: This song was rushed into print between the sinking of the Maine on February 16, 1898 and the declaration of war on April 25, 1898.

Eagle soar on high, and sound the battle cry!

1. How proudly sailed the warship Maine,
a Nation's pride, without a stain!
A wreck she lies, her sailors slain.
By Trecherous butchers, paid by Spain!

Refrain:

Eagle soar on high,
And sound the battle cry
Wave the starry flag!
In mire it shall not drag!

2. Why does the breeze such sad thoughts bring,
Like murmuring seas the echoes sing?
Why do clouds thus backward roll,
Like wave on wave, on rock on shoal!

.....

3. Awake! Thy Stars and Stripes unfurl,
And shot and shell and vengeance hurl!
Though clouds gather, they will go,
and sunlight follow after woe.

Refrain:

Awake! it is no dream;
Dost hear the sailors scream?
Comrades will you go?
Avenge the cruel blow!
.....
And crush their marble heart!

Source: Marie Elizabeth Lamb, *Awake United States!* (New Orleans, LA: 1898).

READ: RECONCENTRATION CAMPS

Head Note: By the late 1800's, the Spanish were losing control of their colony, Cuba. Concerned about guerrilla warfare in the countryside, they moved rural Cubans to "reconcentration" camps where the Spanish claimed they would be better able to protect them. However, people around the world saw newspaper reports that described horrible conditions in the camps for the Cuban people, who were called "reconcentrados." This account was forwarded to Washington D.C. by Fitzhugh Lee, who said its author was "a man of integrity and character."

SIR:

[W]e will relate to you what we saw with our own eyes:

Four hundred and sixty women and children thrown on the ground, heaped pell-mell as animals, some in a dying condition, others sick and others dead, without the slightest cleanliness, nor the least help....

Among the many deaths we witnessed there was one scene impossible to forget. There is still alive the only living witness, a young girl of 18 years, whom we found seemingly lifeless on the ground; on her right-hand side was the body of a young mother, cold and rigid, but with her young child still alive clinging to her dead breast; on her left-hand side was also the corpse of a dead woman holding her son in a dead embrace....

The circumstances are the following: complete accumulation of bodies dead and alive, so that it was impossible to take one step without walking over them; the greatest want of cleanliness, want of light, air, and water; the food lacking in quality and quantity what was necessary to sustain life....

From all this we deduct that the number of deaths among the reconcentrados has amounted to 77 per cent.

Source: Excerpt from an unsigned enclosure included with a telegram sent by Fitzhugh Lee, U.S. Consul General in Cuba, November 27, 1897. Havana, Cuba.

READ: MARCH OF THE FLAG

Head Note: Beveridge gave this speech while he was campaigning to become a Senator for Indiana. The speech helped him win the election and made him one of the leading advocates of American expansion.

Fellow citizens, — it is a noble land that God has given us; a land that can feed and clothe the world.... It is a mighty people that he has planted on this soil.... It is a glorious history our God has bestowed upon his chosen people; ... a history of soldiers who carried the flag across the blazing deserts and through the ranks of hostile mountains, even to the gates of sunset; a history of a multiplying people who overran a continent in half a century....

... William McKinley is continuing the policy that Jefferson began....

The Opposition tells us that we ought not to govern a people without their consent. I answer, The rule of liberty that all just government derives its authority from the consent of the governed, applies only to those who are capable of self-government. I answer, We govern the Indians without their consent, we govern our territories without their consent, we govern our children without their consent....

They ask us how we will govern these new possessions. I answer: ... If England can govern foreign lands, so can America. If Germany can govern foreign lands, so can America. If they can supervise protectorates, so can America. ...

What does all this mean for every one of us? It means opportunity for all the glorious young manhood of the republic—the most virile, ambitious, impatient, militant manhood the world has ever seen. It means that the resources and the commerce of these immensely rich dominions will be increased....

In Cuba, alone, there are 15,000,000 acres of forest unacquainted with the axe. There are exhaustless mines of iron.... There are millions of acres yet unexplored....

It means new employment and better wages for every laboring man in the Union....

Appendix HH

Maya's Outline Template for Spanish American War Essay

Why did the US invade Cuba? Outline for Writing a Short Essay

Thesis Statement: The US invaded Cuba for these main reasons _____, _____, and _____.

1. Reason #1: _____

Evidence/Quote: _____

Explanation of Evidence: _____

Evidence/Quote: _____

Explanation of Evidence: _____

Closing Sentence _____

2. Reason #2: _____

Evidence/Quote: _____

Explanation of Evidence: _____

Evidence/Quote: _____

Explanation of Evidence: _____

Closing Sentence _____

2/10/2013

Appendix II

Ranking Exercise: Teacher Rankings of Influences on Instructional Practices

Steve

Revolutionary War Unit

1. Social studies department
2. Beliefs about the purposes of history education
3. Experiences as a history student in high school and undergraduate classrooms
4. Teacher education
5. Knowledge of how historians approach historical study

Westward Expansion Unit

1. District standards, curriculum or assessments
2. Beliefs about the purposes of history education
3. Social studies department
4. Teacher education
5. Students' incoming skills, knowledge and interests

Bryan

Imperialism and World War I⁴⁹

1. Knowledge of how to make content and/or strategies accessible to students
2. Teacher education
3. Students' incoming skills, knowledge and interests
4. District standards, curriculum and/or assessments
5. Beliefs about the purposes of history education

Spanish American War Lessons

1. Knowledge of how to make content and/or strategies accessible to students
2. Students' incoming skills, knowledge and interests
3. Ideal vision for how want to teach history
4. Teacher education
5. Knowledge of how historians approach historical study

World War II

1. Other influence: time to teach the unit
2. District curriculum, standards and/or assessments
3. Social studies department
4. Ideal vision of how want to teach history
5. Knowledge of how to make content and/or strategies accessible to students

⁴⁹ Bryan completed two ranking tasks for this first unit. He completed one for the entire unit on imperialism and World War I. He completed a second one for the set of observed lessons on the Spanish American War only.

Maya

Imperialism and Spanish American War

1. Ideal vision for how want to teach history
2. Students' incoming skills, knowledge and interests
3. Teacher education
4. Knowledge of how to make content and/or strategies accessible to students
5. District curriculum, standards and/or assessments

World War II

1. Students' incoming skills, knowledge and interests
2. Knowledge of how to make content and/or strategies accessible to students
3. Teacher education
4. Knowledge of how historians approach historical study
5. Ideal vision for how want to teach history

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